Study Plan

CLM Essentials Process Reporting Research

Admins

Background & Objectives

Customers expect reporting as a basic CLM functionality, but currently CLM customers have no visibility into the efficiency of their workflow processes and have no way to demonstrate the ROI of CLM. Competitor systems do offer reporting of this nature, which is leading to lost sales and increased churn.

Starting in R3 2022, initial experiences to support process reporting will be developed for CLM Essentials. This research project will extend those initial experiences and more deeply explore process reporting needs of CLM customers and the best ways to provide that information to customers.

This work focuses on the known jobs of identifying bottlenecks, optimizing process efficiency, assessing performance and evaluating ROI and the users we believe are primarily focused on those jobs: Legal and Sales Managers and individual contributors and process builders and admins.

Research Objectives

This research seeks to evaluate proposed design concepts for process reporting and understand if the designs are sufficient in supporting the known jobs of these users: Identify bottlenecks; Optimize workflow process; Assess individual and team performance; Evaluate ROI

Specific Research Questions:

- Can users perform the key jobs related to process reporting: Identify bottlenecks; Assess Performance; Optimize process efficiency; Evaluate ROI?
    - Confirm that the **data types** we are presenting are the most critical for users; Identify any missing critical data
    - Assess whether the proposed **locations** for the information are acceptable for users
    - Assess whether the **presentation of information** is the best format for displaying process data
    - Assess how **consumable the data** is in the way it's displayed and visualized
    - Assess how users need and expect to be able to **interact with the data** visualizations
- Learn about the context around process reporting data
    - What triggers needing to see it? How frequent are those triggers?
    - What actions will they take from the information?
- What other data, reporting and visualization needs do our users have beyond the concepts tested? (lower priority)

Method

60 minute, remote moderated interviews with design concept review

Participant Profile

Specific Criteria

Total	6-8
Criteria	Current Essentials customers Admins or users who are building processes in Essentials
Industry	Any
Company size	SMB to Mid (larger ok too)

Introduction (5 min)

About us

Hi **<Participant name>!** Thank you so much for being here and for agreeing to take the time to help us out today! My name is **Petrina Chan**, and I'm a user experience researcher at DocuSign. I'll be walking you through our session today and I'm excited to get started!

There are some other members of my team here on this call, and they'll be taking notes and observing with their cameras off throughout the session. **[NEXT SLIDE]**

[Time to sign consent if needed] or thank you for signing already.

Today we'll be taking a look at some preliminary concepts that we have developed for contract process reporting in CLM Essentials, and chatting about your thoughts and experiences. During our session, I'll be asking you to go through some tasks on a DocuSign prototype and answer some questions so we can evaluate the experience.

Our goal is to create great product experiences at DocuSign, so your personal experience & viewpoints matter a lot and directly shape our products **[NEXT SLIDE]**

About the research

- **Rough time breakdown**
  - To give you an overview of our session, …..
  - We'll continue this Intro which should only take a few minutes (5 min)
  - Then have a short Background Discussion where I'll tell you more about what we're looking at (5 min)
  - After that we will do a few Activities where you will interact with the concepts that we have developed. This will take the bulk of our time.(45 min)
  - Then we just have some last words and & Closing Discussion (5 min) **[NEXT SLIDE]**
- **Prototype:**
  - In some of our activities, you'll be using a prototype of the concepts that we have

developed. Because this is a concept, the prototype you will be using is just that, a prototype—Not all the features or functionality you would expect from a finished tool will be there. We'd like you to do your best to use it as if it were "real", and in the cases where it doesn't have full functionality, please tell us how you would expect to use it or expect it to function.

  - As you browse through the prototype to complete each task, I'm going to ask you to try and **think out loud as much as possible** by telling me what you're looking at, what you're clicking on, what you're trying to do, and what you're thinking as we go along. This will be a really big help to us, and we encourage you to be as candid as possible.
- **Please don't worry that you're going to offend us or hurt our feelings.** Your feedback will help us improve the experience, so we really want to hear your honest opinions! If you feel something looks wrong or works unexpectedly, please say so.
- One final thing, **we're testing the product, not you**. You can't do anything wrong here.
- Also, please feel free to ask me questions at any time. I may not be able to answer them directly since we're interested in seeing how people navigate the platform without instructions provided, but I will address questions to the best of my ability. And if you need to take a break at any point, just let me know.

Do you have any questions before we start the session?

Before we start, I want to ask if you are alright with this session being recorded for reference and note taking. The recording will only be used for our research and the recording won't be seen by anyone except me and my team members. Are you comfortable with that?

[START RECORDING] [NEXT SLIDE]

Intro/Warm-up Questions (5 min)

To start out, I just have a couple questions to get to know you a little bit better

1. If you could just please state your name and tell me a little bit about your role and responsibilities at [company].
2. **And can you briefly describe how you are using DocuSign at your company? Please include the names of the products if you know them.**
   a. Clarify names and specifics.
   b. How do you interact with DocuSign specifically? (if not answered already)
3. How do your work responsibilities relate to contracts in particular? (if they didn't answer above)
   a. Do you have responsibilities relating specifically to building contract workflows?
4. I know you're just kicking off using CLM Essentials, so how did you manage your contracts before this? (Include for participants who are onboarding, not live)

[NEXT SLIDE] Ok great, thank you for answering those for me! Now I'm going to give you a brief overview of what we'll be looking at today and ask a couple more questions about your current work process.

Current Process Reporting Discussion

As I mentioned earlier, we are introducing contract process reporting in CLM Essentials. Our vision is to offer a way for people to evaluate the efficiency of their contract workflow processes. We are looking forward to seeing what you think about some of these concepts so far!

- Check in: Before I move on, Does the term “contract process reporting” make sense to you? is that what you would call it
- **IF NO:** By contract processes, we are referring to the different stages and steps that a contract might go through, such as different types of negotiation, review, approval, editing, and sending for signature.
- And by contract process reporting, we are talking about data and reports that help users analyze the efficiency of their contract processes, including all the steps I mentioned above, and identify bottlenecks.

To start off our discussion on process reporting, I have a couple more intro questions.

Questions for Discussion

1. Are you currently doing anything to **monitor** your contract processes?
   a. If **yes**: Are you doing anything to **optimize** them? What are you looking for when you are monitoring?
      i. If **yes**: What does your need to optimize contract processes/workflows look like right now? And how is that currently operating? (who, what is involved)
2. If **no (to either):** Why not?

Great, thank you. Any questions before we move on? **[NEXT SLIDE]**

Concept Test

Task Intro:
Now we are going to start using the prototypes.

For these tasks, we’re going to do a couple activities in which I will give you a **hypothetical scenario** and you will explain to me what you would do in that scenario.

I will give you remote control of my screen so that you can perform the tasks on the prototype that I will have pulled up.

As you go through this activity, remember to please think aloud. To do this you will read any text you notice on the screen out loud - even the text on a button, every detail matters. Please narrate what you are doing as you do it (for example, if I was going to click on this link, I would say “I’m going to click on this link that says “Task 1 link” since I think it will take me to our first activity).

Verbalize any thoughts or questions that come up naturally for you and explain the reasons for the decisions and actions that you make. This will help me follow your experience. And remember there is no right or wrong answer. So please be honest, and remember that any and all feedback is valuable, and you will not offend us!

I will now be giving you remote control access, which gives you control of my screen as if it was your own. **[Set up remote control] I think you should see something pop up on your screen, and then you have to click on the screen to accept the control. Any time I take control back, you will have to click to regain the control on your end.**

Go ahead and move your mouse around to see if it's working. Please note that there might be a slight lag or delay. Ok, great! Now I'm going to give you the instructions for your first task.

Part I: Current Prototype Task / Co-Design/Creation [TIME CAP: 5 min]

Our first task is going to be very brief, and I'm going to monitor the time so that we have time to get through everything else as well.

What you're seeing here might look a bit familiar; this is a static image of the current CLM essentials interface.

Earlier, we talked about a feature for monitoring the performance of your contract processes.

Imagine you're looking for this feature in CLM essentials, where would you go on this screen to do it? Try to describe where on the page you would go to and what you would expect to see and do when navigating to this feature. What path and actions would you take from here to find data about your processes?

Since this is a hypothetical exercise, do the best you can to describe what you envision. (If they ask for clarification: for example, to show where or what you might click).

- Dig into their reasoning, the WHY
    - Why in this particular location?
    - Why a certain interaction?
    - Does this choice make another interaction or task easier?
    - How does this choice fit in with the rest of the workflow?

Ok great, thank you! Now we're going to switch to a different prototype for the rest of our scenario-based activities. I will take over control of the screen for just one second.

[Switch to reporting prototype]

Part II: Task/Vignettes
I'm going to pull up the prototype now, but before you take a closer look at it, I want to finish up explaining the instructions and scenario.

This prototype includes some of our current ideas for the integration of process reporting in CLM essentials. It is interactive in certain places, but not all functionalities are implemented. Again, we'd like you to do your best to use it as if it were "real" and in the cases where it doesn't have full functionality please tell us how you would expect to use it or expect it to function.

Do you have any questions before I give you the scenario?

> Notes for researcher:

- Prompt them to explain the visualizations & other information they are seeing
- Watch to see if they are trying to do something, make sure to ask what they were trying to do

Scenario:
Great, here is your scenario:
Imagine that you are working at [your current company] , and you are in charge of [building and monitoring processes in CLM Essentials].

You have heard complaints recently that the **legal team** at your company is delaying the contract approval process.

You are informed that in particular, **standard NDAs** are taking a significantly longer time to approve and sign. You want to take a look at your company's contract processes to uncover more information relating to this complaint and how you can address it.

Sub Task 1:

SO, first I want you to navigate to where you might go to see the data that you need in order to learn about **approval time** for **Standard NDAs.** Remember to please think out loud as you look around the pages and navigate.

You might have to move the Zoom videos and windows around to see everything on the screen

★ **SPLIT: Participant either finds info on Dashboard OR within Process Builder**

Great, I'll have you stop here for a moment! You have finished our first task.

Before we move on to the next task, I have a couple follow up questions for you.

Post task Qs:

On a scale of 1 to 5, with 1 being strongly **disagree** and 5 being strongly **agree**, how would respond to the following statement:

1. The [**Reporting]** page was easy to find
    a. Why would you give it that rating?
    b. Is there anywhere else you would have expected to or would like to find this information?

Sub Task 2:

Okay, great, thanks!

Now, I want you to walk me through what you're seeing here on this page and your general impressions about it. Please talk out loud and describe what information you see here and what you think about it, but don't click on anything yet.

- What are your initial impressions?
- What do you see here?

- What do you like or dislike about it?
- What do you think you can do here?

Alright, now I want you to click around to find any info that might help you learn more about **Standard NDA approval times** and if the **legal team** is holding up approval. Remember to keep thinking out loud and talking about what you are seeing.

> Participant notices legal approval taking a long time? If they don't point it out themselves, guide them to see it. If they still don't see it, point it out to them. At this point, do you feel that you have confirmed or found sufficient evidence that legal approval is indeed taking longer than it should?

Now that you know that **internal, legal approval** is taking a significantly longer time than other stages in the process, what would you do with that information? What next steps would you take?

- Interactions with the data/visualization?
- Is there any other kind of information you'd like to see here?
- Is there anyone else who you think would want to know this information?
- How would you communicate it?
- What changes would you make? Where? To what?
- Would you monitor the changes? How often? What would you look for? How would you ideally go about doing this?

Post task Qs:

On a scale of 1 to 5, with 1 being strongly **disagree** and 5 being strongly **agree**, how would respond to the following statements:

1. It was easy to find the information (data?) I was looking for using the DocuSign process reporting feature
    c. Why?
    d. Is there anywhere else you would have expected to or would like to find this information?
2. [and again, on a scale of 1- 5, with 1 being strongly **disagree** and 5 being strongly **agree**, how would you respond to the following] It was easy to **interpret the data** that was presented to me in the DocuSign process reporting feature
    a. Why?
    b. Are there any other ways the data should be presented? Does the visualization(s) and text content both make sense?

And next, on a scale of 1-5, **with 1 being low and 5 being high**, how well did this experience help you **analyze contract processes and identify bottlenecks**?

- Why did you give it that score?
- What specific things in the experience or product make you feel that way?
- Are there any other products, experiences, or methods that help you optimize your contract processes? **OR** you mentioned that you are/were doing XYZ to monitor and/or optimize your contract processes…
    - If yes: How does this help you with that? **How does this experience compare to what you are currently doing?**

Sub task 3:

[While navigating back to the beginning of the prototype] Now, imagine that **[3 months]** have passed and you want to see if the approval time for **standard NDAs** has improved since the change was implemented. Where would you go to check on this?

- **[if functionality not built out]** > what would you expect to see? What would you expect to happen here?
- If **"I would just do the same thing as I just did"**: Ok, could you just walk me through that again then? Just like you did last time
  - What specific things would you look at to evaluate if there was any change?

Quick follow up Q's:

- What do you think about the way this is presented?
- How well does this help you evaluate changes approval time?
- What could be better?

Post-post task Qs:

Great! Now that you are familiar with the basics of the contract process reporting, I have a few follow up questions.

- In your own words describe what the process reporting feature is and your understanding of it/how it functions

Taking a look at the chart here, is it useful to be able to view both the **step type** (so these are the larger bucket categories) and the **individual steps** (which are the custom named steps that fall into those type buckets)? **(Navigate to Step Type**) as well as (**distinct steps) ?** Why or why not?

What do you think of the way these are grouped and how the groups are currently named? Do they make sense to you? Is the data in each grouping what you would expect?

Great, thanks! Now I'm going to show you another location where we are considering placing process reporting. **[Instruct participant to navigate to home page and into whichever option they did not choose earlier]**

Show alternate location (within process builder or within dashboard) So I know that you went to [previous location to find the process reporting page], but another location we were thinking of is ….

Considering this alternate location:

- How do you feel about process reports being located here versus in _______
- Which feels more natural and intuitive? Why?
- Which feels quicker or more efficient? Why?
- Is there anywhere else you would have expected or want to find this page?

Ok great, thank you! That is the end of that activity.

Part III: Ranking task (Miro)

Now I'm going to switch to a new window for the next activity. **[SWITCH TO MIRO]** Here written on these sticky notes, you can see a few different data types that we are thinking of including in contract process reporting. In this space, you can drag and drop each sticky note by clicking and dragging them with your mouse.

Are you using a mouse or a trackpad? **[Make sure to toggle mouse/trackpad setting in Miro]**

The instructions are here over on the left hand side **[read them out]** Go ahead and try them out to make sure they;re working for you

If you use a mouse:
- To move around the board, press the right mouse button and drag
- To zoom, scroll the mouse wheel
- To create the selection field, switch to select tool, click and drag the canvas

If you use the trackpad:
- Slide two fingers to move around the board
- Pinch to zoom
- To select objects, switch to select tool, press and drag the canvas

If you use the touchscreen:
- Drag the canvas to move around
- Pinch to zoom
- Long press and drag to select objects

I want you to take a look at all of these 8 options and rate the usefulness of these data types for **your core responsibilities and tasks** at your job.

The scale is from 1-5, with 1 being not useful at all and 5 being extremely useful. You can simply drag and drop each option into its respective rating, like this **[demonstrate: for example, if I think that average time to sign by agreement type is extremely important to have, I would place it in 5]**.

You can have as many or as few items as you want in each category. Just let me know verbally when you are finished and if you have any questions or need clarification about the data types. You do not have to think out loud or say anything while you do this since I will be asking you some questions after you're all done.

> Ask about reasonings for each priority section.
Ok great! I'm going to ask you some questions about where you placed these. Feel free to move them during our conversation if you change your mind about any placements.

- I see you put [XYZs] as extremely useful, could you elaborate on why these would be useful to you?
- In what scenarios might you want to look at this? Specific triggers?
  - Others involved?
  - Certain events?
- How would you expect this to be presented to you? Visual graphic? Text? Table?

- How often would you check this?
- What types of actions might you take after seeing these reports if any?
- Why did you rank XYZ more useful than ABC?

> Did you feel like anything was missing?

- Blank stickies for them to write in their own ideas and place them?
- Are there other types of data that we haven't discussed that might be useful or important to you? They don't have to be related directly to contract processes, just any type of data in general. Would you like to see that data visualized? (Researcher note : Is it agreement data?)

Data types (8) [show visual examples if available]:

- **Analyze process efficiency**
  - Average time in each stage of the contract process, internal and external tasks
  - Average time spent with each internal team/department
  - Average time to sign by agreement type
- **Assess Performance**
  - Average time spent with each individual end-user who worked on it -at each stage of the process
  - Average time spent with each individual end-user who worked on it in aggregate
- **Job: Evaluate ROI**
  - Time to sign over time (in progress – working on time filter?)
  - Contract volume over time

Part IV Abridged (if running out of time):
Aside from those in your role, are there any other people who might benefit from being able to view these reports and insights?

Overall, do you think that process reports would be useful to you? [Why / why not]

- Any other things/tasks would you hope to use process reporting for?
- Is there anything missing from the experience that we didn't talk about?

SKIP TO END

Part IV Interview/Discussion:

Ok great! Thank you for completing those tasks with me. Now we are going to move on to the second part of the study, which is just going to be an open-ended conversation and hypothetical scenario building about how you might utilize reporting in your own work. Like I mentioned before, this feature is rather new and early in its development. We want your help figuring out how it should function, based on your needs and how you might utilize reports and insights. I'm going to pull the prototype back up, so feel free to navigate around the prototype while we discuss for reference, but I won't be asking you to do anything specific with it.

Can you think of a time when it would be helpful to view data related to your contract processes? This can be real situations that have happened or hypothetical situations.

If NO: Why not? Is there something else that you would find more useful?

If YES:
What would prompt you to look into this?

- Others involved?
- Certain events?
- Specific triggers?

What kind of reports/insights would you be looking for in these instances and how/why would they help?

- How would you expect this to be presented to you? Visual graphic? Text? Table?
- How often would you check this?
- What types of actions might you take after seeing these reports if any?

Are there other types of data that we haven't discussed that might be useful or important to you? ANything not directly related to contract workflows?

We're also thinking about the integration of data types that don't come directly from workflow processes and are more related to agreements and contracts as a whole, such as **the number of contracts of each type that were signed over time**. Would you find data like this useful alongside data about contract processes?

OPTIONAL (relevance & time):
Do you also use DocuSign eSignature in addition to CLM essentials?

- **[Ask about eSign data]**

Aside from those in your role, are there any other people who might benefit from being able to view these reports and insights?

Overall, do you think that process reports would be useful? [Why / why not]

- Any other things/tasks would you hope to use process reporting for?
- Is there anything missing from the experience that we didn't talk about?

> If not confident with tasks and other things: pivot to interview-heavy session

Wrap Up (5 min)

Ok, that's it! Thank you so much for taking the time to help us out and for giving us great feedback. Before we wrap everything up, just a few more quick questions:

- Is there anything else you would like to share with us that we haven't touched on?
- What, if anything, did you like most about your experience? Why?
- What, if anything, was your least favorite part about your experience? Why?
- Do you have any questions for me?

[Compensation information redacted]

Thanks again for your time today! Have a great rest of the day/week/weekend!