

From Deployment to Independence: Enabling Success with DocuSign Insight

Client Challenge

A leading UK retail bank urgently needed to implement a DocuSign Insight instance to address a critical compliance challenge: identifying which of their contracts specified data housing locations that could be affected by evolving post-Brexit and European data security regulations. The ability to rapidly surface these clauses was essential to ensure regulatory alignment and mitigate legal and operational risks.

To meet this need, the bank sought a partner who could not only deliver a swift and effective deployment of Insight, but also enable their internal team to manage and scale the solution independently. The objective was to establish a traceable and scalable contract review process—initially focused on the data storage use case—that could be expanded over time.

Cimplifi Solution

Cimplifi partnered with the bank to deliver a comprehensive solution that addressed both the urgency of deployment and the need for long-term capability building:

- **Accelerated Deployment:** Delivered a swift implementation of the DocuSign Insight environment, enabling the bank to begin reviewing contracts for data residency clauses without delay.
- **Bespoke Enablement:** Designed and delivered bespoke training sessions aligned to the bank's internal workflows, team structure, and strategic objectives. This ensured that the client's legal and compliance teams could confidently operate the platform from day one.
- **Embedded Expertise:** Provided hands-on, practical guidance throughout the engagement, leveraging deep product knowledge to support adoption and troubleshoot early-stage challenges.
- **Capability Building for the Future:** Helped establish a Centre of Excellence, equipping the bank to independently expand Insight's use across future contract intelligence initiatives.

Impact

The bank now has a fully deployed and optimised Insight environment supported by a trained internal team equipped to manage the platform autonomously. Through a strategic blend of rapid implementation and targeted knowledge transfer, Cimplifi helped the client accelerate time-to-value while fostering organisational confidence in adopting new technologies. This engagement exemplifies how Cimplifi is committed to empowering clients with both the tools and the expertise required to achieve sustainable success.