DocuSign Partner Learning Plan: Sales Professional
** Effective July - September 2018 **

Onboarding	Orientation	Boot Camp	Electives
Downloadable Job Aids	On-Demand or Live	On-Demand	On-Demand

Overview

This learning plan is designed to prepare Sales Representatives, Account Executives, and Account Managers to start selling DocuSign. To access the latest version of this document, go to http://DocuSign.Partners/Sales-Learning, and then click the Download button in the top middle of your browser.

This document is broken into four sections: **Onboarding**, **Orientation**, **Boot Camp**, and **Electives**. The Onboarding section lists downloadable job aids which include partner and customer ready resources and much more. The Orientation section provides information for partners to setup up a live introduction to DocuSign's value proposition and navigation of essential resources. The Boot Camp modules enable partners' sales employees to start selling DocuSign using available resources that are proven to win customers. The Electives section lists courses that help partners learn more about specific DocuSign features, integrations, and more.

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Onboarding

Each table in this section contain links to different resources available for partners ranging from partner-only use to publicly available resources. In the table below, you will find links to partner-only sales resources.

Important. Restricted Information. Do not share resources marked with a red asterix * with customers nor others outside your organization.

* Partner-Ready Resources		
* Two Page Battle Card	* Two Page Battle Card Editable	* Quick Start Sales Training (One Page)
* Persona: HR, IT, Legal, Procurement and Sales	* Persona: Life Sciences, Healthcare, Insurance, Financial Services	

In the table below, you will find links to customer-ready sales resources that can be freely shared outside of your organization.

Resources below may be shared freely with your customers.

Customer-Ready Resources		
Click Through Demo	Enterprise Customer Presentation	Enterprise Customer Presentation (EMEA Partners)
SMB Customer Presentation (EMEA Partners)	SMB Customer Presentation	

In the table below, you will find links to additional customer-ready sales resources that can be freely shared outside of your organization.

Resources below may be shared freely with your customers.

Additional Customer-Ready Resources		
About DocuSign	eSignature	eSignature Legality
Business Solutions for Industries & Departments	Knowledge Market (Map Tool for Use Cases)	Industry Use Case Compilation
Analyst Whitepapers and Reposts	Case Studies and Customer Testimonials	

Orientation

DocuSign provides partners a 45- to 60-minute Partner Sales Orientation to provide partner sales teams a brief introduction to the DocuSign value proposition and navigate the essential resources including the partner portal.

To request a partner orientation please contact partners@docusign.com.

Boot Camp

DocuSign's Sales Boot Camp for Partners is intended to enable partner sales teams to start selling DocuSign using available resources to complete key sales activities that are proven to win customers. Click the Module course name to open the course in DocuSign University.

Module Name	Description	Time
Selling DocuSign	By the end of the course, you will be able to adapt your elevator pitch to position DocuSign, answering the questions What Is DocuSign and Why DocuSign.	60 minutes
Demonstrating DocuSign	By the end of the course, you will be able to locate tools for quick demonstrations, set up a template in the developer sandbox, and demonstrate DocuSign's basic sign, send and manage functionality.	60 minutes
Value Proposition	By the end of the course, you will be able to explain the value of DocuSign as a solution, articulate the three pillars of value, and apply DocuSign's sales tools to a typical customer/prospect.	60 minutes
Quote & Close	By the end of the course, you will be able to ask qualifying questions, prepare pricing and packaging, handle objections, and register a deal or referral on DocuSign Partner Portal.	60 minutes

Electives

Electives provide partners a deeper understand of different aspects of DocuSign including legality, connections, and fundamentals. The table below contains electives available, their description, and time to completion. Click the Elective course name to open the course in DocuSign University.

Elective Name	Description	Time
DocuSign Legal Overview for Partners	After reviewing this course, you will be able to explain the ways DocuSign allows customers to meet their regulatory and legal requirements, and to identify and locate relevant resources.	10 minutes
DocuSign Security Overview for Partners	After reviewing this course, you will be able to explain how DocuSign ensures the privacy and security of customers' data, and to identify and locate relevant resources.	10 minutes
Using the DocuSign Print Driver	After reviewing this course, you will be able to recognize the key features of the DocuSign Print Driver, how to use Print Driver to upload a document to a new envelope and how to manage your Print Driver settings.	15 minutes
Managing Envelopes as a Sender	After reviewing this course, you will be able to create envelope folders, view shared envelopes, download completed envelopes and download form data.	15 minutes
Sending an Envelope with a Template	After reviewing this course, you will be able to use a template from your template folder, apply a template to an envelope, use multiple templates in one envelope and manage your template matching settings.	25 minutes
Sending to Bulk Recipients	After reviewing this course, you will be able to identify the key bulk send features, you will learn how to generate and complete a customized bulk Recipient CSV file and send an envelope using bulk send and a template.	20 minutes
Understanding Envelope Security and Authentication for Senders	After reviewing this course, you will be able to identify different types of authentication, recognize how to send an envelope using additional authentication and recognize how to manage Signer failed authentication.	15 minutes
Sending Envelopes Using Comments	After reviewing this course, you will be able to enable and disable comments when sending, view comment notifications and reply to comments.	15 minutes
Updating Your Profile Settings	After reviewing this course, you will be able to customize your profile, setup your electronic notary in DocuSign, define your signature and manage your email notification settings.	15 minutes

Elective Name	Description	Time
Using Additional Recipient Actions When Sending	After reviewing this course, you will be able to assign additional Recipient actions including, Specify Recipients, Allow to Edit Recipient, Update Recipients and In Person Signer.	15 minutes
Using Advanced Fields and Actions When Sending	After reviewing this course, you will be able to use Payment fields, Formula fields, Auto place and Conditional Logic when adding fields to a document.	20 minutes
Using Advanced Options When Sending	After reviewing this course, you will be able to use supplemental documents, allow Recipients to markup a document, configure reminders and expirations and customize email and language for Recipients.	20 minutes
Using Document Fields	After reviewing this course, you will be able to navigate the Add Fields view, understand why and how to use standard fields, create custom fields and set field properties.	20 minutes
Using Envelope Actions after Sending	After reviewing this course, you will be able to resend an envelope, correct an in-progress envelope, create a copy of an envelope and void an envelope.	15 minutes
Using Reporting as a Sender	After reviewing this course, you will be able to use a standard report, create a custom report and schedule a report.	15 minutes
Using PowerForms as a Sender	After reviewing this course, you will be able to recognize examples of when to use a PowerForm, be able to copy and distribute a PowerForm URL and manage PowerForm responses.	15 minutes
Getting Started with Signing Envelopes	After reviewing this course, you will be able to identify the steps in a signing process, to recognize a DocuSign signing email notification, and to sign an Envelope using basic fields such as signature and initial.	15 minutes
Using Advanced Features When Signing Envelopes	After reviewing this course, you will be able to, upload an attachment during signing, use the approve or decline buttons, sign using Comments and sign using Payments.	15 minutes
Recognizing Authentication Methods for Signers	After reviewing this course, you will be able to recognize the different authentication methods available to signers during the signing process.	10 minutes
Using Other Signing Actions When Signing Envelopes	After reviewing this course, you will be able to finish signing later, sign on paper, decline to sign, assign signing to another Recipient and use DocuSign Document Markup.	20 minutes

Elective Name	Description	Time
Managing Envelopes as a DocuSign Signer	After reviewing this course, you will be able to manage and download envelopes in your DocuSign account.	10 minutes
DocuSign for Dynamics Online CRM Sender Fundamentals	This learning pathway enables a sender within DocuSign for Dynamics CRM Online to send documents and to use get signature to send documents.	25 minutes
DocuSign Google Integrations	After reviewing this course, you will be able to explain how Google integrates their different software with DocuSign including; Chrome Extension, DocuSign for G Suite, DocuSign for Gmail, DocuSign for Google Docs, and DocuSign for Google Drive.	45 minutes
DocuSign for Microsoft Reseller Training	After reviewing this course, you will be able to explain how Microsoft integrates their different software with DocuSign.	15 minutes
DocuSign for Salesforce Sender Fundamentals	After reviewing this course, you will be able to send envelopes for signature from within Salesforce, manage envelopes, use standard or custom reports, establish your account profile, and understand document workflow and security.	60 minutes
DocuSign for SharePoint Sender Fundamentals	After reviewing this course, you will be able to sign documents and send documents to request signatures within DocuSign for SharePoint Online.	60 minutes