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RM Maturity Stories: DocuSign



PRESENTERS



David Binnings
Sr Director
Services GTM Strategy
& Ops



Katy Mabbitt
Director
Strategy Ops Account
Management



Eric Mannweiler
Sr Resource Manager
Strategy Ops Account
Management

Agenda

- 1** Our Roots: The RM Baseline
- 2** What We Heard: The Roadmap to Expansion
- 3** Portable Solution: Resource Management Anywhere
- 4** The First Mile: How It All Started
- 5** Turning Point: Our Road to Change
- 6** Still Evolving: What's Next?

Customer Success

Services

Professional Services

220+ Resources
Global Footprint
4 Regions

Onboarding

90+ Resources
Global Footprint
4 Regions

DocuSign University

20+ Resources
Global Footprint
4 Regions

Services Operations

Resource Management

Customer Success Account Management

North America CSAM

xx+ Resources
2 Regions

International CSAM

xx+ Resources
2 Regions

CSAM Operations

**** No RMO ****

“There’s no consistency in our assignments”

“We can’t get alignment across the teams on resourcing”

“How their resources are assigned depends on what team you’re talking about”

“We constantly have to rework who’s assigned to what”

“We don’t have a good systematic way to do that”

“Our Ops team doesn’t have the bandwidth to do this anymore”

“We aren’t able to plan for capacity”

“Not sure who assigns for that team - maybe their manager, maybe Ops??”

Resource Management can solve for this!

Resource Management Definition

Selecting the most appropriate resource(s) necessary to perform a given task(s) with a desired outcome, and deploying those same resources in the most efficient manner possible

Source: Resource Management Institute

Right Person



Right Place



Right Time

RM Happens *Everywhere* - Whether You Call It That or Not

- Allocating headcount to strategic initiatives
- Identifying skills gaps and planning how to fill them
- Balancing time across conflicting priorities
- Matching people's strengths to business needs
- Planning who works on what, and when
- Prioritizing limited resource during crunch times
- Shifting workloads based on changing business needs
- Filling gaps when someone's out unexpectedly



- Assignment decisions were manager-driven and inconsistent
- Regional Ops stepped in without a formal global process
- Decisions were made live in conference rooms – whoever showed up got “dibs”
- Everyone dreaded annual re-assignment planning
- Managers and Ops had full plates—assignments were a side task no one had time for
- Stakeholders were burned out on the process
- The business was held back by not having a team dedicated to managing assignments

“We all hated it.”

Trust Was the Foundation

Stakeholders were ready for change—we just had to build trust

Started with Regional Ops – North America first then expanded around the globe

Partnered deeply to understand their pain and build solutions. Built credibility one region at a time

Knowledge Transfer = Heavy Lift

60-90 days of shadowing, enablement and documentation. Years of know-how lived only in people's heads —turning tacit knowledge into a system

Learning the Language

We became fluent in the language of Customer Success. “Book of Business,” “Renewal,” “AE,” “CSAM” —we built shared vocabulary

Understanding the Business

Who gets assigned to what customer, when, and why? What defines a good assignment? We studied what “good” looks like and used it to create a resource management methodology appropriate to Customer Success.

Framing Demand and Supply

We aligned with our cross functional partners in Sales and Territory Ops to define our customers and appropriately allocate them to our Customer Success capacity

Speed Bumps: Challenges and Lessons Learned

Building global policy/procedures takes time

- Resolutions can feel and look like they take longer
- Make sure your field teams know the steps you're taking and why.

Consistency across the team is very important

- Trust is hard won and hard kept
- Don't let your team become a scapegoat!

Make good internal staffing decisions for your team

- Having a good coverage plan is crucial
- Who will start the expansion? Who will join later?
- What teams need what kind of support?

Roles and Responsibilities may need to be corrected - multiple times

- Find sweet spot between giving away remit and being an Ops junk drawer.
- Some things may need to be a compromise - for now...

You need a good transition plan with the team you're taking over for

- The field may try to "ask the other parent"...
- Agree with the previous support on how to handle disagreements and challenges
- You want every early interaction to build trust

Current Position

Level 3 - 4 Defined

- Centralized global resource management function
- Established proactive resource management Practices
- Good visibility into demand, capacity, and allocations
- Standardized processes with appropriate tools; CRM for Customer Success
- Metrics ownership
- Processes documented
- Some KPIs established

Next Steps

Firmly Level 4 Quantitatively Managed

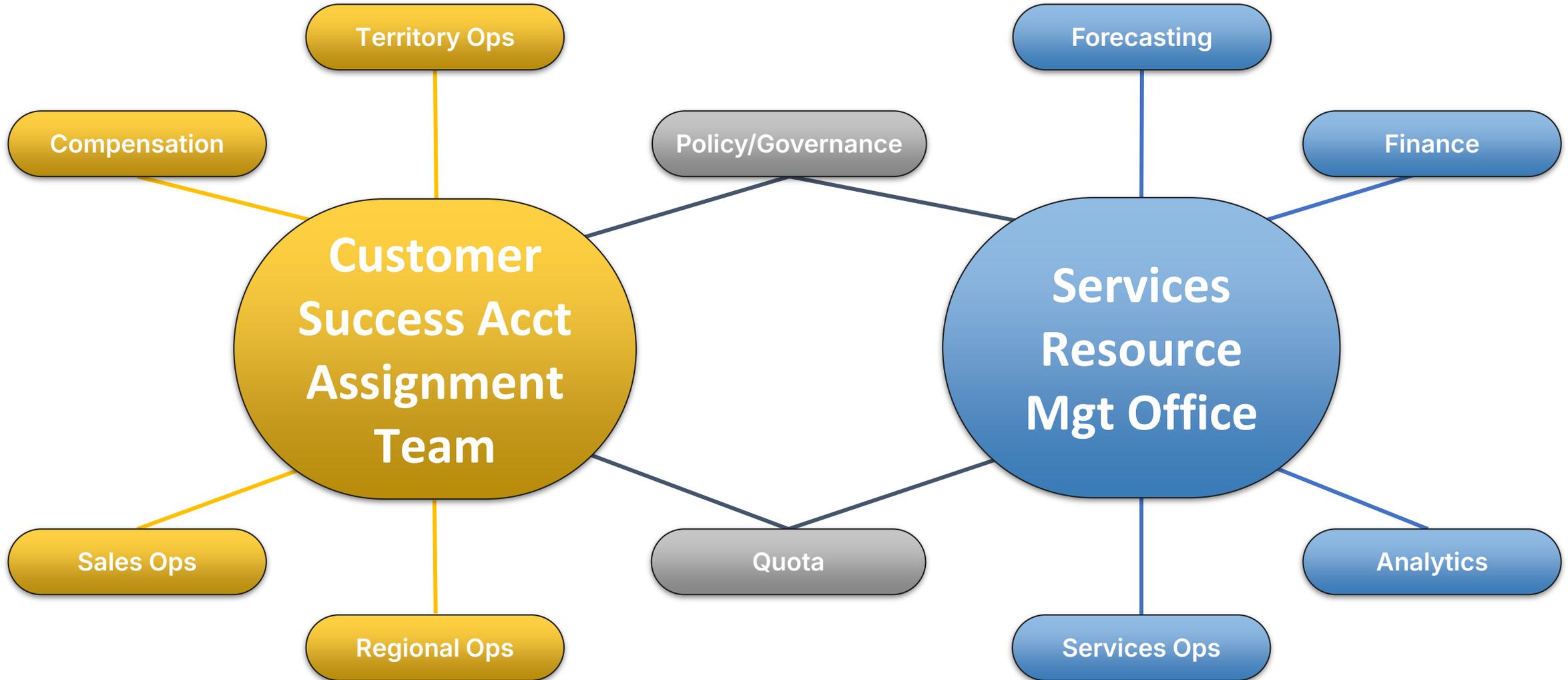
- Enhanced metrics ownership including coverage and capacity modeling utilizing metrics to forecast resource needs
- Apply statistical methods to manage process performance
- Implementation of skills repository tool with future state plan to integrate to CRM

Future Goal

Achieving Level 5 Optimized

- Automation of resource mapping
- Cross functional alignment with Sales Ops, Territory Ops
- Reliable data across interconnected systems/tools
- Proactive identification and mitigation of process inefficiencies
- Metrics transition from spreadsheets to dashboards

We Stand in the Middle



Wherever people are doing work, there's a place for Resource Management.



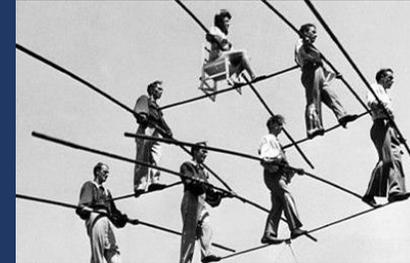
Look for chaos, burnout, or "whoever's available" assignment patterns. That's your opening



Understand how success is measured in that function. Speak their language before proposing change.



Start small. Find a pain point and a champion. Listen more than you pitch.



Show how resource alignment improves outcomes—efficiency, fairness, capacity, clarity.



Document wins. Share learnings. Don't rush. A structured, trusted approach will earn adoption.

Efficiency is doing better what is already being done.

----Peter Drucker----

Thank You!

Questions?