

Your E-Signature Migration Checklist

- i** **SaaS teams:** you'll lean on API keys and the embeddable editor here.
Agencies: keep this scoped per client, bulk send changes the calculus.
Internal Business: mostly skip this step, no developer needed.
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☐ Audit your current setup

Templates, document types, reusable fields, user roles, approval steps, external signer groups

☐ Map your technical dependencies

API calls, webhooks, CRM/ERP touchpoints

☐ Confirm signer identity requirements

Email OTP, stronger verification, per-region rules

☐ Shortlist and test 2 to 3 providers with a real end-to-end envelope

☐ Run old and new systems in parallel

☐ Migrate production workflows in phases

☐ Gradual Cutover and Decommissioning

Cut over gradually and decommission, mindful of the notice period