

DocuSign for Insurance Agents and Brokers



INDUSTRY BRIEF

As an agent/broker, success depends on signing up new policies, servicing your customers, and running your business better than competitors. Waiting for paper signatures can put your revenue and reputation with customers at risk. Join more than six hundred insurance companies and the industry's largest brokers to automate electronic signature and document flow with DocuSign.



"The time savings from DocuSign is significant and substantial. I can't imagine our business without DocuSign."

Jeff Arnold
President, RightSure Insurance

Reduce Costs for Staff Time, Shipping, and Paper

DocuSign saves you significant staff time because documents get sent for signature instantly along with automated reminders so clients finish the signing process faster. DocuSign ensures that trailing documents and other forms are signed and filed correctly, and account records are updated when customers make changes. Plus, you can cut costs for paper, ink, faxing, couriers and overnight shipping dramatically.

Grow Revenue by Getting Policies Signed Faster

The time it takes applicants to complete underwriting documents using ink and paper puts you at risk of customer defection, especially if your competitors can complete the process faster. With DocuSign, applicants complete and sign documents in minutes, and without errors, so your cycle time comes down dramatically with less chance that clients take their business elsewhere. Your staff can spend less time tracking down signatures and trailing documents, and more time focusing on sales.

Reduce E&O Exposure

With DocuSign, you can more easily obtain signatures on all the forms you're obligated to collect, both those you send on to carriers, and those you need to retain for your own records. DocuSign requires signers to fill out and sign forms completely, providing more consistency in your documents. This ensures better compliance with your agency's E&O policy and better peace of mind.

Eliminate Incomplete Forms

DocuSign goes beyond simply collecting an electronic signature. Documents, data and signatures go straight into your back-end systems, eliminating scanning or manual re-keying, and incomplete forms are sent back to the signer, so every form is 100% complete. Data fields can be collected, captured and verified at the point of signature, and loaded directly into your system for downstream use.

