

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

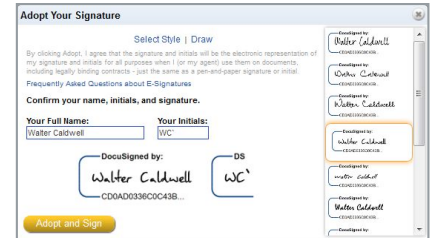
With DocuSign, you can more easily obtain signatures on all the forms you're obligated to collect, both those you send on to carriers, and those you need to retain for your own records. DocuSign requires signers to fill out and sign forms completely, providing more consistency in your documents. This 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.

Delight Your Clients

DocuSign is accessible on all devices, including PCs, smartphones and tablets and it supports iOS, Android, and Windows mobile devices. Clients get a faster, more convenient, and easier way to interact with you, no matter where they are. Not only will this increase client satisfaction, but will also let you focus your client face time on relationship building rather than on paperwork.



Improve Document Security

DocuSign offers an enterprise-class network with a track record of 99.99% system availability proven to be safe, reliable and secure. It has the highest level of security certification, ISO, SSAE16, and PCI compliance, and TRUSTe certification. DocuSign's fully redundant SSAE 16 certified data centers, network, policies, and procedures have passed 100% of security audits with the largest insurance and financial services institutions, making DocuSign safer and more secure than pen and paper.

Accepted by Downstream Partners

Electronic signatures have been legally accepted for over a decade, but to work in your business, they also need to be accepted by your downstream partners, such as your carriers and state government agencies. And we've partnered with providers such as iPipeline to ensure the platform meets their needs as well.

Insurance Agent & Broker Use Cases

With DocuSign you can automate a wide variety of processes, including:

- New policy applications
- Trailing documents
- Coverage election forms
- Coverage declination forms
- Premium Finance Agreements
- State required forms
- Account change forms
- Change of address/beneficiary forms
- Book of business rollover
- Contracts
- Purchase orders
- New employee paperwork
- Expense reporting
- Non-disclosure agreements
- IT asset tracking

Sample Customers



Arthur J. Gallagher & Co.



For More Information

Contact your account executive to learn more about how DocuSign can help improve your client experience.

About DocuSign

DocuSign® is the global standard for electronic signature®. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.



For U.S. inquiries: toll free 877.720.2040 | docusign.com
For European inquiries: free phone +44 203 510 6500 | docusign.co.uk