

Aon Affinity Accelerates Compliance and Drives Errors to '0' with DocuSign

Using DocuSign for Salesforce, Aon is saving more than 200 hours of data entry work per year

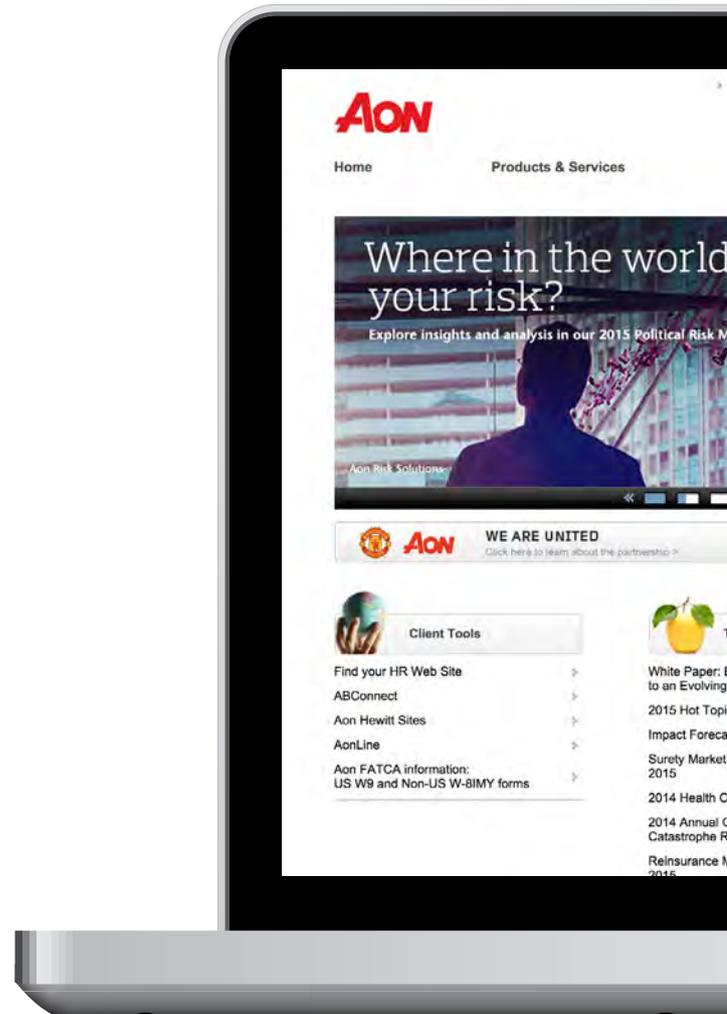
Company's Top Objectives

With a goal of streamlining and simplifying compliance for its independent and small-town agency sub-producers, Aon Affinity implemented DocuSign electronic signature, which has enabled the company to save more than 200 hours of work per year and bring its compliance documentation error rate to zero—all while increasing the signing rate.

Challenge

Aon offers more than 32 different insurance products. The independent insurance agencies that sell the products are required to sign a single set of compliance materials, which Aon sends and processes for up to 1,000 agencies per year. Prior to DocuSign, these materials would be emailed as PDFs to the agency, then printed, filled out, signed, and then faxed or scanned and emailed back to Aon.

The information would be manually entered into Aon's Salesforce CRM system. The process was manual and required about 20 to 25 minutes for data entry—delaying sales opportunities for agencies and losing momentum during the sign-up process. Many forms were delayed, returned with errors or simply not returned at all. When they were returned, they were subject to further delays in order to re-key customersupplied data, as well as errors when re-keyed.



Top Benefits Achieved

- ✓ Saved more than 200 hours of data entry work per year
- ✓ Increased signing rate by 20 percent
- ✓ Dramatically improved client experience

Once the documents are returned the final steps take about 90 seconds per agreement

The Resolution

Looking to assure compliance and eliminate the hassle of the process for its sub-producers, Aon looked into electronic signatures, ultimately electing DocuSign over a competitor due to the ease of use, seamless integration with Salesforce, and the ability to use Drawloop to collect data into agreements.

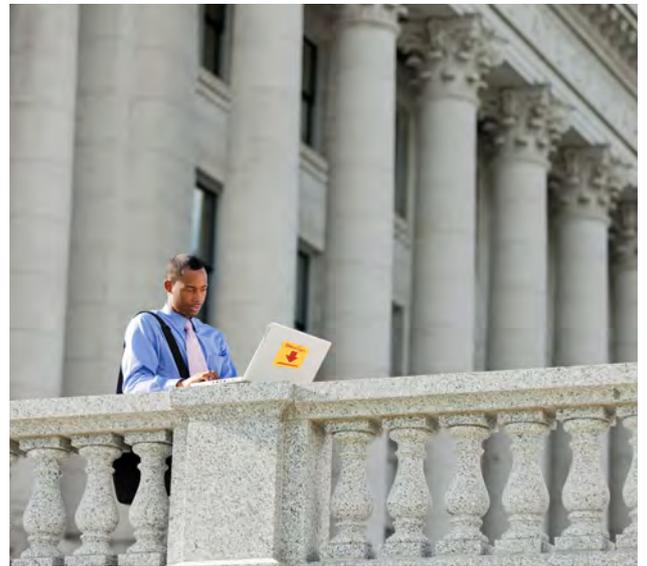
The Key Benefits

Now using DocuSign for Salesforce, Aon is saving more than 200 hours of data entry work per year. "DocuSign is an incredible time saver," said Sean Wylie, sales operations specialist at Aon. "DocuSign automatically integrates with Salesforce, ensuring data supplied by customers is automatically updated in our systems. DocuSign for Salesforce allows me to focus on supporting our sales processes instead of data entry."

The DocuSign workflow begins when a producer agreement is requested through Salesforce. Drawloop's Dynamic Document Protocol (DDP) generates the unified producer agreement and prepares the documents for signature.

Once the documents are returned the final steps take about 90 seconds per agreement. In the past, the process would take up to 25 minutes. Salesforce is automatically updated with any new or revised information, including the address, phone, compliance details, and custom objects for license and E&O insurance. "Because all this information is pumped back into Salesforce, there's no need to manually update any fields. DocuSign completely eliminates the potential for error from re-keying customer data," said Wylie.

Just as important, Aon has received feedback that their signers value the ease and convenience of DocuSign. "With DocuSign, we've seen a twenty percent increase in signing rate," said Wylie. "The document error rate has dropped to nearly zero in the past two years, and the speed of completion has gone up dramatically. In fact, a few people emailed after DocuSigning to ask how to get DocuSign for their own businesses. It's that powerful."



With DocuSign, we've seen a 20% increase in signing rate.

Sean Wylie,
Aon Insurance

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