



Aon Affinity Drives Signing Rate and Eliminates Document Errors with DocuSign for Salesforce

Summary

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

Aon Affinity, a branch of London-based multinational Aon plc, specializes in developing, marketing, and administering an array of customized insurance programs and solutions. Known for its commitment to client satisfaction, Aon draws on its depth of expertise and an extensive pool of longstanding relationships with top-tier carriers to deliver its clients innovative, tailor-made insurance solutions.

Challenge

Aon Affinity offers more than 32 insurance products that are sold by independent insurance agencies. When agencies sell Aon's products, they are required to sign a single set of compliance materials. In any given year, Aon sends and processes compliance materials for up to 1,000 insurance agencies. Prior to DocuSign, Aon emailed these compliance materials to individual agencies as PDFs, and the agencies would then print, fill out, and sign these materials. Completed materials were then faxed or scanned and emailed back to Aon. Aon would then manually rekey this information into its CRM, Salesforce. This data reentry was tedious and could take up to 25 minutes, delaying sales opportunities for agencies and slowing momentum during the sign-up process. Often, forms were delayed, returned with errors, or simply not returned at all. Aon needed a new system.

Solution

Aiming to ensure compliance and eliminate hassle for its sub-producers, Aon Affinity investigated various electronic signature solutions. Ultimately, Aon selected DocuSign's comprehensive Digital Transaction



"With DocuSign, we've seen a 20 percent increase in our signing rate."

Sean Wylie
Sales Operations Specialist, Aon

Management (DTM) platform for its ease of use, seamless integration with Salesforce, and ability to sync with Drawloop for populating forms with data.

Results

Since implementing DocuSign for Salesforce, Aon has been able to reduce time spent on rekeying data by more than 200 hours per year. "DocuSign is an incredible time-saver," says Sean Wylie, Sales Operations Specialist at Aon. "It 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 keying data."

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

Once the documents are signed and returned, the final steps take about 90 seconds per agreement. In Aon's old system of rekeying data, this process could take up to 25 minutes to complete, and if documents contained errors, it could take even longer. With the DocuSign integration, Salesforce automatically updates with any new or revised information, including addresses, phone numbers, compliance details, and custom objects for



license and E&O insurance. "Because all this information is transferred back into Salesforce, there's no need to manually update fields. DocuSign completely eliminates the potential for error from rekeying customer data," says Wylie.

Additionally, Aon has found that with DocuSign's ease-of-use, transparency, and error elimination, more contracts are getting signed and clients are happier. "The document error rate has dropped to nearly zero in the past two years, and the speed and rate of completion have gone up dramatically," says Wylie. "Since we started with DocuSign, we've seen a twenty percent increase in our signing rate, and our clients love it. A few people have even emailed after DocuSigning to ask how to get DocuSign for their own businesses. It's that powerful."



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