

# AAA of Washington reduces contract cycle time by 85% with DocuSign

AAA of Washington now offers a mobile solution customers embrace and find easy to use. DocuSign helps AAA of Washington dramatically reduce “not in good order” contracts caused by errors and mistakes in paper documents.

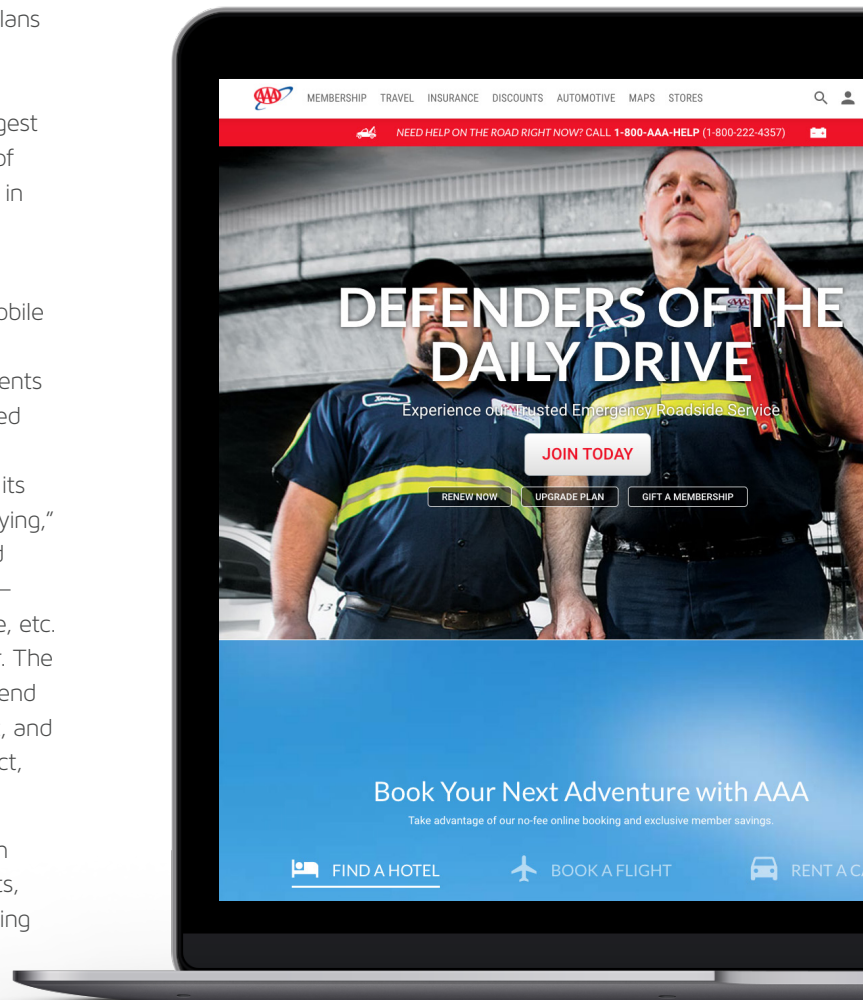
## Summary

AAA of Washington offers a variety of services, including travel plans and road-side assistance for motorists. But perhaps their largest service is an insurance provider. They work with nine different companies, incorporating some 130,000 policies, and are the largest personalized insurance agency in the state of Washington. AAA of Washington serves clients through 85 agents across 26 locations in the state.

## Challenge

Much like the move from fold-up maps to navigation apps on mobile phones, AAA of Washington was looking to digitize the manual, paper-based processes that supported its insurance business. Agents working in the field, traveling to meet customers in-person created challenges when it came to initiating a contract, completing and signing it, delivering it back to the home office and then tracking its progress. “The old work flow was horrendous. It was a little terrifying,” exclaims Field Agency Sales Specialist, Chris Lavin. “Agents would print off all applications, make little demarcations in the margins – telling the customer to sign here, initial here, sign here, initial here, etc. Then the agent would scan that in, then email it to the customer. The customer would print it, sign where indicated, scan it, and then send it back to the agent. Then the agent would print it, sign it, scan it, and send it off to our quality control group. All this for a single contract, and we do 1,200 policies a month,” Lavin remarks.

The process would take an average of 14 days to complete. Much of that due to simple mistakes, errors and incomplete agreements, otherwise known as “Not In Good Order” contracts. It meant having



## Results Achieved

- ✓ Contract completion time reduced by 85%
- ✓ Improved, more efficient work-flow
- ✓ Better security and tracking of documents for audits
- ✓ A vastly improved customer experience
- ✓ Provides an easy to use, mobile-friendly solution that customers embrace

an agent drive back out to meet the client and start much of the process all over again.

AAA of Washington clearly needed a digital solution but wanted to ensure the solution was mobile friendly, reliable and secure. In particular, security was vital because personal information was collected from customers as part of the process.

Any new digital solution also had to support compliance and auditing requirements. AAA of Washington found many agents were either delinquent in their reporting, or, in some cases didn't know they needed to report, which put a lot of business at risk.

The old work-flow was prone to additional problems that caused back-logs and inefficiencies. "Agents often filed their paperwork at the last minute resulting in our quality control team having inconsistent work volume with peaks and valleys. During the peaks, stacks and stacks of applications would pile up on their desks awaiting review and approval over the course of the month," Lavin describes.

### Solution

AAA of Washington selected DocuSign for its digital transformation and immediately discovered a myriad of use case opportunities. Insurance policy applications and claims were the most obvious, but travel and road-side assistance contracts and applications soon followed.

They've incorporated DocuSign into licensing and HR, as well. "When we onboard a new employee, our HR department sends out the compensation plan via DocuSign. Our licensing department takes care of the appointment paperwork, but we have nine different companies we work with, so we'd get as many applications back and there was no consistency. Now, with it all completed via templates using DocuSign, all applications are the same helping to streamline our work flow," says Lavin.

AAA of Washington rolled out DocuSign to its field agents first. Following training over the course of a month, it's being used across the company. "We're pretty close to 100 percent of usage at this point. Our adoption rate's really high because it's so easy to use and removes so much pain from previous, paper-based processes," he says.

### Results

The ROI for AAA of Washington has been profound. The completion rate for new business applications was reduced by 85%, from 14 days to just two. The rate of "Not In Good Order"

.....  
"The old work flow was horrendous and more than a little terrifying. But now, with DocuSign we streamlined the process and improved our members' experience with insurance agents, our travel agents, and roadside assistance."

- **Chris Lavin, Field Agency Sales Specialist,**  
AAA of Washington

.....

contracts has been drastically reduced as well.

AAA of Washington is completely satisfied with the security DocuSign provides. "We can trust DocuSign. We can trust that the encryption is taken care of and we don't worry about losing anybody's data," Lavin remarks. "It completely helps in an audit because the insurance carrier actually sends us back a list every week highlighting any forms they haven't received back yet," Lavin notes. Additionally, AAA of Washington has confidence that all business going forward is compliant. "We know from this day forward we have correct forms and a record of transactions. We can now find what we need through a simple search of completed DocuSign envelopes," Lavin describes.

AAA of Washington often shredded documents as a safety measure. This exposed an unexpected ROI after enabling DocuSign. "We went from six shredding bins a quarter, to two a year in the corporate office," Lavin remarks.

And because of leveraging new digital solutions with DocuSign, AAA of Washington saw new opportunity to provide additional value to their customers. "When we land a new policy, we want to welcome our member, and say, 'Thank you for your membership, and here's your welcome packet.' We have a digital version of that. So, I added it as the landing page on each completed DocuSign document," exclaims Lavin.

Postage, gas, time, paper, ink, printing. These are all areas where AAA of Washington has seen significant savings after enabling DocuSign, but Lavin says it goes beyond the upfront hard-cost savings, "We're actually selling more than we did prior to DocuSign. After six months of data we were able to show that the agents who used DocuSign sell more business because they have more time to sell than the agents who don't. That combined with a great experience translates to more, happier members."

### About DocuSign

DocuSign® is changing how business gets done by empowering anyone to send, sign and manage documents anytime, anywhere, on any device with trust and confidence. DocuSign and Go to keep life and business moving forward.

For U.S. inquiries: toll free 866.219.4318 | [docuSign.com](https://www.docuSign.com)

For EMEA inquiries: phone +44 203 714 4800 | email: [emea@docuSign.com](mailto:emea@docuSign.com) | [docuSign.co.uk](https://www.docuSign.co.uk)

For APAC inquiries: phone +61 2 9392 1998 | email: [apac@docuSign.com](mailto:apac@docuSign.com) | [docuSign.com.au](https://www.docuSign.com.au)

Copyright © 2003-2017 DocuSign, Inc. All rights reserved. DocuSign, the DocuSign logo, "The Global Standard for Digital Transaction Management", "Close it in the Cloud", SecureFields, Stick-eTabs, PowerForms, "The fastest way to get a signature", The No-Paper logo, Smart Envelopes, SmartNav, "DocuSign It!", "The World Works Better with DocuSign" and ForceFields are trademarks or registered trademarks of DocuSign, Inc. in the United States and/or other countries. All other trademarks and registered trademarks are the property of their respective holders.

