



# SAFE CREDIT UNION

SAFE Credit Union has served its members since 1940. It began with 10 founding members and has grown to more than 200,000. SAFE offers superior financial services at lower or even no cost. Because SAFE is a financial cooperative, each member benefits from the combined strength and unique commitment to excellence that SAFE provides.

## CHALLENGE

SAFE has been in business for more than 77 years, and, as a result, its processes have relied heavily on paper across all of their business functions. Not only did the organization want a secure e-signature solution, but it had to get employees to embrace this new digital culture and ultimately the broader paradigm shift. This made simplicity of use an easy integration, important to the choice of a digital solution.

Agreements and document completion were taking a long time and the process needed to be streamlined, more efficient, and much faster. SAFE also wanted a better external user experience by offering a mobile-friendly solution.

## SOLUTION

SAFE implemented DocuSign externally with its members and internally with back office teams. SAFE has already expanded DocuSign use cases across the business. It is now being used for performance reviews and bonus plan incentives. "There's more and more adoption every year as we continue to be on the platform," explains Lixa Anderson, Applications and Development Manager for SAFE Credit Union.

## RESULTS

DocuSign has dramatically changed the work-flow for SAFE. Agreements are now completed much faster, especially when multiple signatures are required. "It's brought



## RESULTS

Total transformation of an outdated paper process



Able to provide a mobile, anywhere, anytime solution



Implemented a digital solution that meets all legal and security compliance standards



efficiency to the back office. Documents are routed to different folks, and get signed much quicker. No more walking around to find a document, or missing people when they're not in their office," Anderson describes.

The mobile experience has been a huge success. "Members can receive a DocuSign email - just do the signature - accept the terms and conditions, and finish the process at home on their tablet or out-and-about running errands on their smart phones," exclaims Anderson.

Internally, SAFE employees love the new DocuSign digital solution. "People were surprised with how easy it is to use. And we are able to see the status and know where a document is sitting. We like to leverage those kinds of data aspects so we know where we are in the process," Anderson concludes.



"DocuSign helps SAFE Credit Union come to agreements faster with our members by leveraging emerging technologies to enable anytime, anywhere access to close our agreements."

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**LIXA ANDERSON**

APPLICATIONS AND DEVELOPMENT  
MANAGER, SAFE CREDIT UNION

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## ABOUT DOCUSIGN

DocuSign is changing how business gets done by empowering anyone to transact anytime, anywhere, on any device with trust and confidence. DocuSign keeps life moving forward.

## CONTACT

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