

# Western Financial Group Achieves Audit Integrity with DocuSign Signature Appliance Signatures

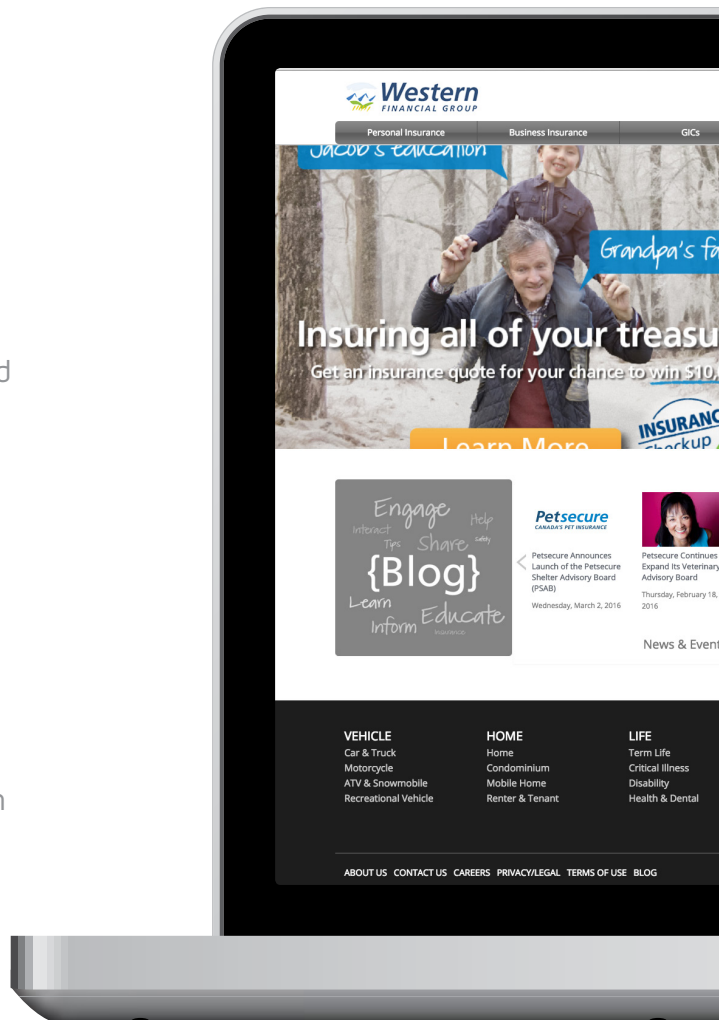
Significant Time and Money Saved with DocuSign Signature Appliance

## Overview

Western Financial Group is a diversified insurance services company that serves more than 790,000 customers across Western Canada. Founded in 1996 and headquartered in High River, Alberta, Western provides personal and business insurance services through more than 160 locations and affiliates and online at [www.westernfinancialgroup.ca](http://www.westernfinancialgroup.ca). With a skilled team of approximately 1,800 employees, Western is committed to building the strongest insurance organization in Western Canada. Western Financial Group is a subsidiary of Desjardins Group, the leading cooperative financial group in Canada.

## Creating a Transparent Evidence Trail with DocuSign Signature Appliance

Western's Business Processes Management team within the Information Management team is responsible for ensuring that Western's processes are as efficient, automated and cost effective as possible.



## Top Benefits Achieved

- ✓ DocuSign Signature Appliance easily integrated with SharePoint and Nintex
- ✓ Workflow Automated and streamlined the business by speeding up the contract processes
- ✓ Significantly increased document accuracy and speed

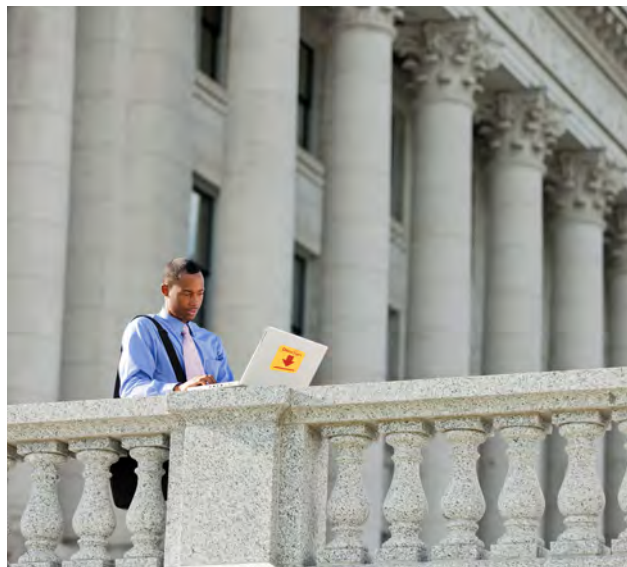
In exploring digital signatures, Karen Malek-Stone and her team not only considered the goal of streamlining processes across the organization, which is dispersed across Canada's Western Provinces, but also addressed concerns with Western's financial auditing requirements.

In order to meet audit requirements and ease auditing processes, Western required a signature tool that would make it possible to easily verify the identity of the signer and the integrity of the document while also offering the highest levels of security. Malek-Stone explains: "We needed a better way to sign our financial statements in order to create a transparent evidence trail for auditing processes. Signature Appliance provided this while also enabling a very smooth signing process in Word and Excel."

When Malek-Stone and her team were exploring DocuSign Signature Appliance, Western was also in the process of deploying SharePoint 2013. "Adding digital signatures would allow us to enhance our SharePoint deployment," she explained. "DocuSign Signature Appliance aligned with Western's SharePoint deployment as it provided built-in SharePoint functionality and could also be seamlessly integrated in the Nintex workflow. Signature Appliance also allowed us to eliminate the time-consuming and expensive process of printing, signing and scanning physical documents."

### **What's Next**

DocuSign Signature Appliance is currently being used for Western Board meeting minutes and members of the financial team for signing monthly, quarterly and annual financial statements. The approval process for some of these documents can involve 2 – 3 levels of review and multiple signers. With DocuSign Signature Appliance, these team members are able to spend their time on tasks that are more valuable than printing and scanning. Shaun Mitchell, Manager of the Information Management team at Western, notes: "We acquired DocuSign Signature Appliance with the future in mind as it can be easily adapted to additional uses and processes. We plan to expand the use of digital signatures in our organization."



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**Karen Malek-Stone**  
**Business Process Management Team Leader,**  
**Western Financial Group**

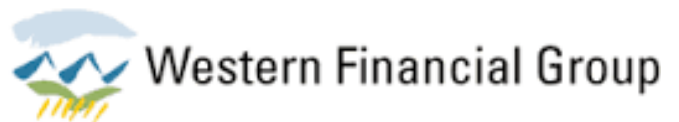


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Karen Malek-Stone

### The Key Benefits

By implementing digital signatures, Western Financial Group enabled their organization to meet the challenges of streamlining inter-office collaboration all the way to approval cycles and submissions. The approval process for some of these documents can involve 2 – 3 levels of review and multiple signers. With Signature Appliance, team members are able to spend their time on tasks that are more valuable than printing and scanning.



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