

Deliver the modern banking experience your customers want.

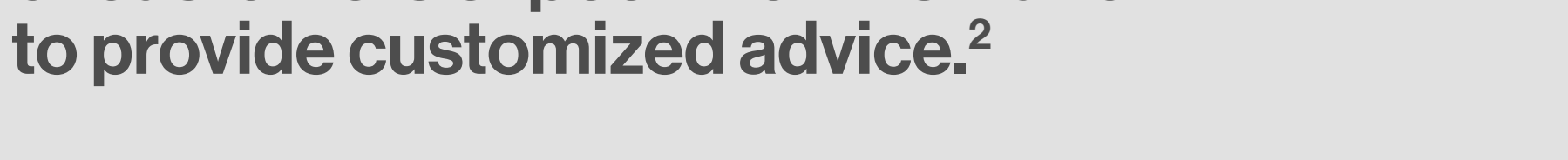
Customer experience is a top priority for financial services leaders.



76% of executives rate **improving customer experience** as a top priority in 2019.¹

And for good reason... Customers want experiences that are:

Personalized



80%

of customers expect their institution to provide customized advice.²

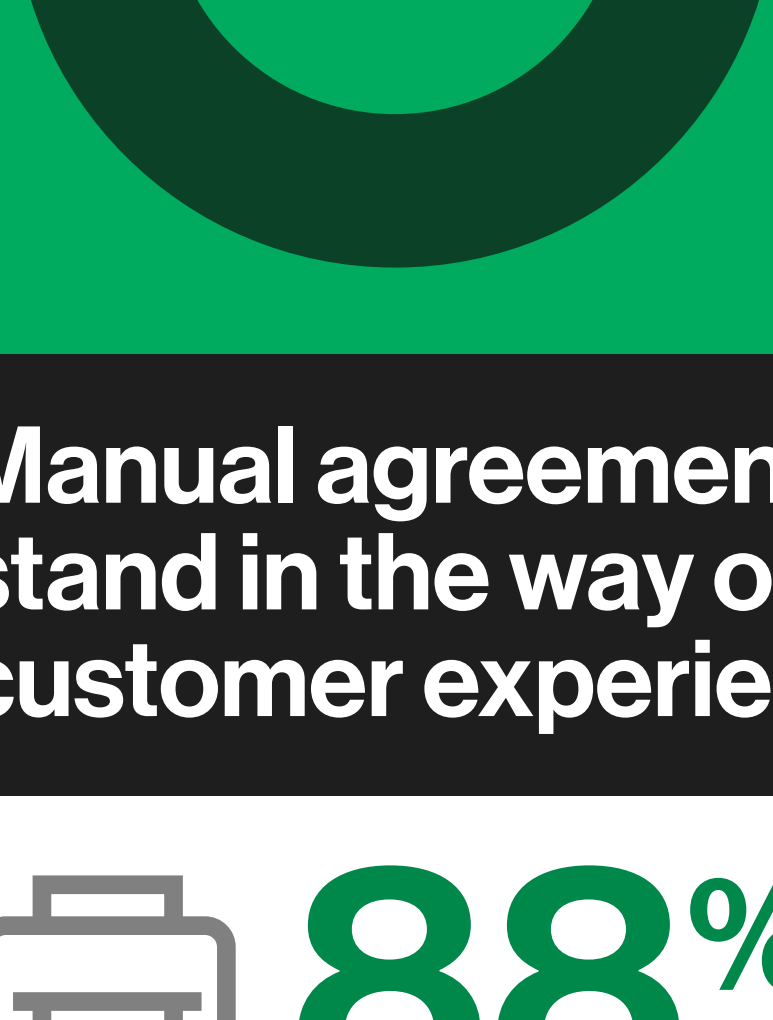
Digital



61%

of millennials have used non-banking alternatives (e.g. Venmo, Mint, SoFi) with an easy-to-use mobile application.³

But most financial institutions fall short.



94% still don't provide **personalized financial guidance**.⁴

Manual agreement processes stand in the way of a better customer experience.



88% of financial agreements (e.g. contracts and new account registration) are still prepared using paper and other manual processes.⁵

Top consequences of outdated processes in financial services:⁶

1 Project delays **49%**

2 Unnecessary costs **43%**

3 Poor customer experience **41%**

Agreements are critical to regulator compliance.



Regulations like KYC involve numerous complex forms, create a poor client experience and can cause it to take, on average, **60 days** to onboard an institutional client.

Digital agreements deliver the seamless, digital, secure experiences that customers expect.



Account opening
Increased conversion rates on mobile



Lending and operations
Automated data entry reduces errors



Contract management
More efficient contract negotiation process



Compliance
(KYC, Capture Consent, LIBOR)
Standardized and centralized compliance



Priorities
More time for what matters most

Don't let paperwork cost you time, money—or customers.

By changing the way agreements are prepared, signed, acted on, and managed, financial services leaders can **close the customer experience gap**, cut costs, and improve compliance.

Financial services leaders' adopting modern systems of agreement experience:⁷

97% improvement in data **accuracy** and completion

77% more **efficient** document turnaround times

90% improvement in agreement processing **productivity**

\$14 **savings** per document processed

Increase conversion and customer satisfaction with the DocuSign Agreement Cloud for Financial Services.



DocuSign Agreement Cloud

Sources
 1 The State of Systems of Agreement, 2019. A commissioned study conducted by Forrester Consulting on behalf of DocuSign
 2 '94% of Banking Firms Can't Deliver on 'Personalization Promise'
 3 FIS 2019 Pace Findings
 4 '94% of Banking Firms Can't Deliver on 'Personalization Promise'
 5 The State of Systems of Agreement, 2019. A commissioned study conducted by Forrester Consulting on behalf of DocuSign
 6 The State of Systems of Agreement, 2019. A commissioned study conducted by Forrester Consulting on behalf of DocuSign
 7 DocuSign internal value engineering assessment of customer results