
Boost profits, delight customers.

Agreements are everywhere in the insurance industry from new business policy applications to claims and first notice of loss. Most processes and systems to obtain these agreements were improvised rather than designed. As a result, they're needlessly slow, costly, and cumbersome for both employees and customers. DocuSign helps simplify and speed up agreement processes, allowing agents, brokers, and employees to focus on what matters most – the customer.

Improve customer experience.

Deliver a convenient, multichannel, and truly satisfying mobile-first customer experience by automating agreement and payment workflows throughout all your core insurance operations.

Accelerate policy and claims management.

Cut cycle times dramatically, enabling customers to complete and sign documents in minutes without errors, reducing cycle times, increasing close rates, and allowing staff to spend more time focusing on sales.

Minimize risks and reduce operational costs.

Collect payments and eSignatures at the same time in one step, and easily integrate documents, data, signatures, and payment collections with your backend systems. Minimize incomplete documents not in good order (NIGO) with our guided signing and payment process.

Meet compliance and regulations needs.

Accurately and efficiently capture authorization to minimize the risk of fraud and non-compliance; stay compliant with digital audit trails; and find and analyze risk in your agreements using AI technology.

Reduce IT costs and enhance time to value.

Implement solutions to digitize your agreement processes within weeks and not years. Pre-built connectors and easy-to-use open APIs allow you to simply plug into existing core solutions, like Guidewire and Salesforce, further automating document generation and sharing processes.

12 of the top 15

U.S. insurance companies
use DocuSign

Over 1,400

life and property and casualty
agencies leverage DocuSign

Results

\$200M

in annual cost savings
AIG

60% reduction

in time to prepare and send
documents for signature
Holt Insurance Agency

85% reduction

in time to complete a new
business application
AAA of Washington

312% ROI

and \$10 saved on every
paperless enrollment
Philadelphia Insurance Companies

“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.”

Chris Lavin
AAA of Washington
Field Agency Sales Specialist

The DocuSign Agreement Cloud for Insurance

It used to be that you had to compromise customer experience to remain compliant. Those days are gone. Rising consumer expectations are shaping the future of the insurance industry. As carriers and agencies vie to retain clients and capture new ones, they're turning to digital technologies to streamline key policy and claims procedures. The DocuSign Agreement Cloud integrates seamlessly into existing processes, streamlining workflows and lowering costs, all while increasing compliance and reducing the time to complete key interactions, allowing you to deliver the right experience, right now.

eSignature

Securely send and sign policy or claims agreements and disclosures electronically, and maintain a complete audit trail.

Guided Forms powered by Intelledox

Turn complicated forms into intuitive "wizard-style" interviews to capture borrower information.

DocuSign CLM

Manage the full agreement lifecycle from automated generation to real-time negotiation to storage and search for complex contracts like insurance claim requests and underwriting documents.

Identify

Choose from a suite of proven authentication and ID verification options to secure access to an agreement.

Integrations

Easily embed DocuSign into platforms where insurance work is done with 350+ pre-built integrations, such as Vertafore, Salesforce, or Guidewire.

To learn more, go to docusign.com/insurance

Use case examples

New policy sales

- Insurer application form
- Disclosures and policy options
- Coverage selection and payments
- Underwriting documents

Claims

- Claims request
- Claims exceptions
- Dispute notices
- Total loss
- Uninsured/underinsured

Servicing

- Policy cancellation authorization
- Issue resolution notification (SLA)
- Premium change notification
- Beneficiary updates

Audit and compliance

- Digital identification to authenticate claim
- Underwriting audits
- Digital audit trails

Agent experience

- New policy
- Onboarding
- Policy management

“The time savings from DocuSign is significant and substantial. I can’t imagine our business without DocuSign.”

Jeff Arnold
RightSure Insurance
President

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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