# **DocuSign**<sup>®</sup>

# Accelerate business with your independent insurance agency network

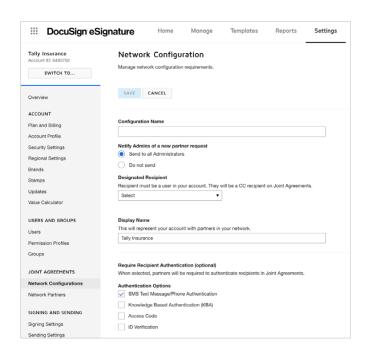
Independent insurance agencies are a vital distribution channel for insurance carriers, but the agent experience of securing new business for carriers is often onerous. Carriers rely on agents to send their customers the correct policy and trailing documents in a complete and timely manner. This process can be fragmented and highly variable from agency to agency -- leading to potential for errors, frustrated agents, and delayed business transactions.

DocuSign Joint Agreements is the trusted way to accelerate business growth and minimize errors with your agency network.

## Streamlined agent management

Eliminate tedious tasks and improve efficiency.

- Link your DocuSign Account with your independent agency network and manage all your agency relationships on DocuSign in one place
- Reduce administrative burden on your agents
- Set up document control and versioning so your agents will automatically use the latest versions of frequently used disclosures



### Accelerate transaction speed

Increase straight-through processing and reduce human errors.

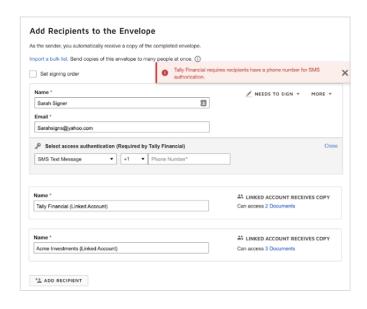
- Expedite agent delivery of signed policies within the 30 day binding period
- Trigger actions off completed documents
  - Archive, monitor, and act on real-time events between you and your agency network
  - Reduce not-in-good-order forms
- Ingest envelope data for downstream workflows
  - Data fields from PDF forms are extracted as dynamic fields that can feed into downstream processes

Envelope Events:	
✓ Envelope Signed/Completed	
Recipient Events:	
Recipient Sent	
Recipient Delivery Failed	
Recipient Delivered	
Recipient Signed/Completed	
Recipient Declined	

# Enforce compliance and mitigate risk

Set controls on agency-sent envelopes to support internal compliance requirements.

- Protect your policy agreements and customer PII with easily applied identification requirements
  - Verify the identity of the signers with your approved methods such as identity verification, knowledgebased authentication, or multi-factor authentication
  - Support compliance requirements such as KYC and AML
- Verification and consent status is recorded in the eSignature Certificate of Completion for compliance and audit purposes
- Enforce document visibility so you only see your own documents, limiting risk of exposure
  - On envelopes with multiple files, receive only the documents within the envelope that need to be shared with your company
- Require agents to use approved T&Cs, privacy policies, and disclosures for every envelope with your carrier documents
- Capture customer consent with a single click, at a document-level within agreements



#### Use cases

# **Policy Sales:**

- Policy applications
- Payment forms
- Exclusions and other trailing documents
- State-specific disclosures

### **Services**

Leverage our proven approach to success with comprehensive implementation and adoption services.

- Digital onboarding experience
- On-demand and self-paced training
- Configuration and rollout expertise