
Modernize Insurance with Digital Agreements

Agreements are fundamental to moments that matter in insurance —from issuing a new policy to resolving a claim to servicing existing policies -- and customers are increasingly expecting these moments to be faster, easier and more trusted. Digital agreements streamline the customer lifecycle, enhance agent and broker productivity, and help insurance organizations grow their business while maintaining strict security and compliance.

Improve policyholder experience

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

Accelerate policy and claims management

Close business faster and expedite claims settlement by automating workflows and enabling customers to complete and sign documents in minutes.

Minimize risks and reduce operational costs

Securely identify and verify signers before processing agreements. Minimize not in good order (NIGO) risk with a guided signing 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 Applied Epic, further automating document generation and sharing processes..

The top 25

Fortune 500 financial companies use DocuSign

Over 1,400

life and property and casualty agencies leverage DocuSign

Results

85% reduction

in time to complete a new business application

312% ROI

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

30%

office space recouped by digitizing documents
Mercury Insurance

150 signatures

digitally captured per month
Downeast Insurance

“Some of the results we’ve seen with Guidewire and DocuSign are still a little mind-blowing. In the first six months, we achieved 90% straight-through processing.”

Tim Hays

Vice President and Chief Information Officer
Mountain West Farm Bureau Mutual Insurance

DocuSign Solutions for Insurance

Insurance organizations are under tremendous pressure today to win and retain customers, reign in costs as climate risk and social inflation hits bottom lines, and navigate rising cyber and fraud risk. The right technology solutions can help insurance organizations more readily tackle these challenges and avoid trade-offs between customer experience and compliance. Here's how the following digital agreement capabilities can help:

eSignature

Securely send and sign policy or claims agreements and disclosures electronically, and maintain a complete audit trail. Reach policyholders faster with SMS notifications and simplify claims submissions with drawing and mark-up capabilities to document damage.

Identify

Secure access to agreements for new policies and claims submissions by choosing from a suite of proven authentication and ID verification options.

Notary

Sign and notarize documents remotely and electronically via a secure audio-visual session. Mitigate risk with a robust audit trail that includes a tamper-evident recording and electronic journal.

Monitor

Protect agreements and mitigate risk of unauthorized activity with round-the-clock tracking and rules-based alerts.

CLM

Manage the full agreement lifecycle from automated generation to real-time negotiation to storage and search for complex underwriting and claims documents.

Integrations

Easily embed DocuSign into platforms where insurance work is done with 400+ pre-built integrations, such as Applied Epic, Salesforce, or Guidewire.

To learn more, go to docusign.com/insurance

About DocuSign

DocuSign helps organizations connect and automate how they navigate their systems of agreement. As part of its industry-leading product lineup, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign platform to accelerate the process of doing business and simplify people's lives.

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
- Licensing documents

“When COVID hit and we closed our doors, DocuSign saved our lives. If it weren't for the ability to get an electronic signature, we wouldn't have written half the new business we did last year.”

Stacy Johansen

President
Downeast Insurance



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