

Drive Growth and Loyalty with Frictionless Agreements

Whether you serve clients, subscribers, or guests, B2C organizations benefit from a seamless and engaging onboarding process that gives customers faster access to the products and services they want. The onboarding process is often the first direct interaction with a business. It presents a key opportunity to deliver value early and make customers feel confident in their decision to work with you. In fact, **86% say** they're more likely to be loyal if they have a supported onboarding experience.

But, the onboarding process can often be fraught with friction. Lengthy forms, manual data entry, and disconnected interfaces can frustrate new customers, leading to high abandonment rates and poor experiences. Agreements, such as applications and order forms, are essential to onboarding and should be a focal point in any customer experience (CX) transformation initiative. Streamlining and automating these agreement processes enable organizations to collect customer information and engagement more efficiently and easily scale their onboarding operations to meet increasing demand. This approach improves the initial customer interaction and fosters long-term loyalty and engagement, driving overall business success.

Eliminate process bottlenecks

Manual and disconnected steps, like scanning and emailing a copy of your ID, can lead to onboarding delays. Manual data entry often requires multiple touchpoints, increasing the likelihood of errors that erode customers' trust in your ability to manage their information securely and accurately. Customers can complete agreement steps faster and in their preferred system by digitizing and automating workflow steps. This also enables greater visibility, allowing you to identify and quickly remedy bottlenecks in individual agreements and the overall process.

Tailor agreements to the customer

With **27% of customers saying** they'll abandon the process due to lengthy forms and 10% due to what they feel are unnecessary questions, tailoring agreements to the individual is no longer optional. By implementing dynamic forms and agreements that adapt questions, fields, and sections, you can reduce unnecessary steps and boost conversion rates. Agreement data can be pushed automatically into downstream processes and systems, shortening the customer's time-to-value.

Drive loyalty and retention

After onboarding, agreements play a critical role in delivering value to customers. Integrating agreements with core systems, such as a CRM, significantly reduces the time employees spend searching for documents, allowing them to respond to customer inquiries swiftly and accurately. This also minimizes administrative burdens so employees can focus on delivering a great customer experience.

The current state of onboarding

90%

of customers think companies could do better when onboarding new customers

3rd

biggest driver of customer churn is poor onboarding experience, behind wrong product fit and lack of engagement

70%

of customers completely abandoned their attempt to open an account when onboarding took longer than 20 minutes

Frictionless agreements in action: marketing event registration

Onboarding for marketing events presents unique challenges, as it involves balancing seamless and accurate registration management with attendees' expectations. Throughout the registration process, various forms and agreements need to be completed and verified by event management before attendees can access the event. Manual steps that can result in long wait times, like physically checking IDs or printing and signing waivers, can frustrate participants and negatively impact their overall event experience, leading to poor reviews and diminished company reputation.

A typical event registration process often involves attendees:



After the onboarding process, information collected such as demographic data, past event attendance, and preferences, can be integrated into core systems like a CRM and leveraged for customized communication and promotions that can significantly enhance the customer relationship.

The above onboarding scenario is common across industries, and a wide range of stakeholders can benefit from digitizing and automating the agreement process to significantly enhance operational efficiency and customer satisfaction. Automation reduces the time and effort required for manual data entry, minimizes the risk of errors, and ensures that all necessary documentation is completed accurately and promptly. This streamlined approach allows you to scale onboarding operations seamlessly, meeting increasing demand without compromising quality.

DocuSign IAM for CX

Too often, customers are dropped out of a digital experience into one that's highly manual and error-prone, causing delays and increasing risk. Intelligent Agreement Management (IAM) is a new category of AI-powered cloud software that streamlines and automates agreement processes. **DocuSign IAM for CX** removes the friction from front-end data collection and verification, helping customers finalize agreements faster and more securely and accelerating scalability. Digitizing and automating agreement workflows also improves employee productivity, boosts customer retention, and reduces operational costs.

To learn more, [check out our latest eBook](#) on frictionless customer onboarding and [connect with our sales team](#).

Results

Ducati West Europe

83%

shorter processing time,
from 1 hour to 10 minutes

80%

documents pre-filled

“Our participants benefit the most from DocuSign. There's no need to print out a stack of paper nor start the day waiting in line to have those documents checked. Now it's really all about having fun on our bikes.”

Marielle Rouquette

Marketing and Communications Director
Ducati West Europe

About DocuSign

DocuSign brings agreements to life. Over 1.5 million customers and more than a billion people in over 180 countries use DocuSign solutions to accelerate the process of doing business and simplify people's lives. With intelligent agreement management, DocuSign unleashes business-critical data that is trapped inside of documents. Until now, these were disconnected from business systems of record, costing businesses time, money, and opportunity. Using DocuSign IAM, companies can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).

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