
Accelerate Lending by Digitizing Agreements with DocuSign and nCino

As financial institutions (FIs) navigate a volatile market and fluctuating interest rates, it's more important than ever to future-proof and grow their business without rapidly adjusting staffing resources. Automation is the simplest solution, but it isn't possible without a cohesive and integrated technology stack. The right technology will allow FIs to automate complex logic, maximize value of their existing investments and create seamless experiences for their staff and customers. That's why DocuSign eSignature offers a prebuilt integration with nCino Document Manager. DocuSign also supports custom deployments connecting DocuSign CLM with nCino Document Manager.

Benefits

Accelerated time to revenue

Redundant data entry and disconnected processes slow down lending processes and lengthen closing times. Automating workflows (e.g. underwriting and contracting) saves time, eliminates headaches and gets interest revenue through the door faster.

Improved customer experience

Customers want quick and convenient experiences. With DocuSign eSignature, they'll receive a mobile-friendly, best-in-class experience for signing disclosures and other closing documents from virtually any device. Customers can receive documents for signature via email or text. Closing teams can send and receive documents for signature without ever leaving nCino and Salesforce.

Minimized security risk

DocuSign eSignature's prebuilt integration to nCino Document Manager and industry-leading APIs support secure flow of documents data between systems and tools. The integration also supports advanced forms of authentication to further mitigate fraud risk.

Supported deployment

For more complex scenarios, professional services and consulting partners work hand in hand with FIs to facilitate custom deployments.

Improved compliance

All electronically signed agreements are backed by digital audit trails and can be automatically routed back to Document Manager or other cold storage systems. DocuSign CLM offers a clause library to ensure the contents of key lending contracts include the right standardized language and covenants.



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.

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How nCino-eSignature works:

- Upload files to nCino Document Manager
- Prepare and tag documents for signature from placeholder within Document Manager
- Send documents for signature and track progress within nCino
- Automate storage of signed documents to nCino Document Manager and cold storage

Sample Documents

- Loan applications
- Pricing statements
- Early disclosures
- Approval letters
- Credit agreements
- Insurance documents
- Booking forms
- Funding forms

How nCino-CLM works:

- Borrower completes loan application in branch or in portal
- nCino captures application data and launches workflows (e.g. underwriting, credit approvals)
- CLM generates and prepopulates closing package
- CLM routes documents and facilitates revisions among credit, sales and legal teams
- Customer electronically receives and signs documents
- Signed documents are automatically routed back to placeholder in nCino Document Manager and cold storage system



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