

Transforming Banking with Intelligent Agreement Management

Today's banking institutions face the dual challenge of meeting rising customer expectations for personalized, digital experiences while simultaneously combating escalating fraud and the pressure to reduce operational costs. The **DocuSign Intelligent Agreement Management (IAM)** platform transforms slow, manual, and error-prone account opening, lending, and maintenance processes into a more streamlined, compliant, and digital journey. By simplifying agreement processes, eliminating rework, and connecting seamlessly with your existing technology stack, the IAM platform empowers your team to delight customers and reduce administrative burden with every agreement.

The top 25 financial companies in the Fortune 500 use DocuSign, and **Newsweek** named us the #1 most trustworthy software and telecommunications company in 2024 and 2025. Our platform helps banking institutions operate more efficiently and securely at critical steps in the agreement process, providing complete audit trails, robust compliance features, and integrations with your core banking system.

Accelerate operational efficiency

Reduce NIGO rates by automating cumbersome manual processes and reducing repetitive data entry with data interoperability and intelligent automation. Your team and customers can leverage pre-filled forms, near real-time data verification, and automatic read/write capabilities with your core banking system. Plus, the DocuSign App Center provides 1,000+ active partner integrations—including Fiserv, MeridianLink, nCino, Jack Henry, Salesforce, and Microsoft—helping ensure your data flows seamlessly.

Delight banking customers

Turn onboarding and routine services into fast, frictionless, and intuitive digital experiences for your customers with the IAM platform. Customers can initiate new account openings, loan applications, or maintenance requests from virtually any device. Interactive web forms, built-in identity verification, and seamless compliance workflows help ensure a simple, more secure, and mobile-friendly journey that can increase conversion rates and drive loyalty.

Ease compliance burdens

DocuSign helps banks meet the KYC and fraud prevention requirements with embedded, near real-time identity and data verification for every financial agreement. With DocuSign, each agreement is fully auditable—digital certificates, time stamps, and secure storage routing help simplify audits and ensure transparency. Automated workflows can minimize human error and help banks adapt to evolving regulatory needs without compromising on a trusted, seamless customer experience, with your data always in your control.

Results

90%

reduced processing time

Metro Credit Union

2x

faster turnaround on agreements

Visions Federal Credit Union

100

paper forms transformed into digital workflows

WSECU

<10 min

average time to remotely notarize documents

Neighborhood Credit Union

"Moving to Intelligent Agreement Management allowed us to unlock that data and make it accessible to all the systems in our ecosystem."

Chief Operating Officer & Chief Strategy Officer
Metro Credit Union

IAM enhances customer experiences and streamlines operations

The IAM platform scales with your organization, leading to more efficient operations and seamless experiences for banking staff and customers.

IAM for Customer Experience

The preconfigured IAM for CX helps you easily capture customer information and build loyalty. By helping automate manual steps like data entry and identity verification, IAM for CX enables customers to complete banking forms and agreements faster from any device. The result is a smooth, engaging experience that increases conversion rates and boosts retention, helping to set your financial institution apart in today's competitive market.

DocuSign IAM platform capabilities

Our capabilities uniquely address each step of the agreement process to help transform your organization and advance your strategic plan.

Web Forms

Effortlessly collect data and dynamically populate banking agreements with interactive web forms for a seamless customer experience, eliminating redundant manual data entry.

Workflow Builder

Automate and design modular agreement workflows with a no-code builder, supporting data interoperability to eliminate manual handoffs.

ID Verification & Risk-Based Verification

Embed identity verification and risk-based screening into the signing process, helping you balance security and customer experience while enabling KYC compliance.

Data Verification

Verify user-input information against internal and external databases in real-time to reduce NIGO documents and streamline the signer experience.

eSignature

Enable a secure, intuitive signing experience across virtually any device, allowing customers to use via a time-stamped, digital signature.

Notary

Enable remote online notarization (RON) with quick access to secure, legally valid notarizations, virtually anytime and anywhere, eliminating in-person visits.

Workspaces

Provide a central hub for customers to upload supporting documents and complete agreements, enhancing the experience for complex transactions.

App Center & Integrations

Leverage 1,000+ pre-built integrations, including key banking systems like Fiserv, MeridianLink, nCino, and Jack Henry, to automatically sync data across your tech stack and streamline processes.

Use case examples

Account opening and lending

- Deposit account application
- Checking and deposits applications
- Credit card applications
- Loan applications (personal, auto, mortgage)
- Cross-selling new financial products

Account servicing and maintenance

- Change of name, address, beneficiary
- Money movement (ACH transfers, wire transfers)
- Maintenance form type reduction
- Power of attorney updates

Process automation and efficiency

- Approval workflow automation
- Manually updating core banking systems
- Reducing NIGO rates
- Post-signature processing

Security and compliance

- Performing KYC checks
- Audit trails and disclosure delivery
- Routing and retention policies
- Consent capture for regulatory disclosures

Operational and risk management

- Annual reviews and audit preparations
- Standardizing disclosures
- Obtaining internal approvals on agreements
- Transfer of assets

Visit docu.ly/financial-services and [connect with our sales team](#) to learn more.

About DocuSign

DocuSign brings agreements to life. Over 1.6 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 to, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).

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