

Celebrating 20 Years of Life-Changing E-Signature Innovation

Today's interconnected commercial landscape offers countless ways for organizations to seamlessly connect with consumers and other businesses. Making a reservation, sending payments and signing a contract are all actions that happen in seconds with the push of a button. But it wasn't always that easy. These seamless, secure modern transactions are not simply the result of cutting-edge companies that have created brilliant innovations. As digital business exploded in the new millennium, key legal guidelines have been at the center of that evolution, ensuring that technology used in digital business transactions meets appropriate criteria.

June 30, 2020 marked the 20th anniversary of the Electronic Signature in Global and National Commerce Act (ESIGN) in the U.S. Before ESIGN established the validity of electronic signature, business transactions required ink-and-paper signatures to finalize agreements. Just 20 years ago, the only way to reliably collect signatures on business documents was to hold in-person meetings or construct a hodgepodge process involving expensive physical mail, fax machines, printers, scanners and photocopiers.

The passage of ESIGN eliminated doubt about the legality and acceptance of electronic signature. It created the framework to replace messy wet ink agreement processes and paved the way for DocuSign and others to build cutting-edge business tools. Milestones like this one are an opportunity to celebrate how far technology has come and how organizations and customers benefit from faster, more connected systems.

In this ebook, we'll examine a highlight reel of customers from all industries that have used electronic signature tools to accelerate the speed of business and give customers a better experience. As you read through, think of the ways your organization could benefit from an improved agreement process today and imagine the exciting improvements that will come in the future.

Real estate

When DocuSign eSignature was first released, the real estate industry was one of the first industries to take advantage of this new technology. Tracking the scale of transaction management improvements in real estate is a great barometer of how innovative leaders are using new technology in everyday transactions.

Keller Williams sets the standard for real estate technology

Co-founder and CEO Gary Keller had a vision to transform the real estate industry. He saw clunky transactions and needless pain points for consumers and reimagined the way real estate could be sold using advances in business technology. The company evolved its consumer offering by starting with internal processes, undergoing a digital transformation to turn a real estate franchise company into a real estate technology company.

The DocuSign Agreement Cloud was at the heart of this transformation, giving Keller Williams a central focus point from which to imagine cohesive consumer experience from start to finish. From that end-to-end foundation, the team can standardize processes and strategically pinpoint best practices and identify opportunities to add consumer-friendly touches from individual agents. The end result is a friction-free experience that allows agents and buyers to use the same agreeable system to manage the entire transaction process.

Today, Keller Williams is the biggest real estate franchise in the world by number of agents, units sold and sales volume. Its business model equips agents with a technological edge to customize the customer experience.

Guild Mortgage undergoes digital transformation with DocuSign Agreement Cloud

Agreeing to a mortgage can be a long and painful process for a consumer, involving thick stacks of paper and confusing documents that need multiple signatures. It's also a heavily regulated industry, which introduces some complexity. When Guild Mortgage began using DocuSign, the goal was to create a more customer-friendly residential financing process that was convenient and intuitive.

To comply with regulations, the mortgage process has several important checkpoints that require signatures to keep the agreement moving and ensure it closes on time. Guild has customized its workflow to adapt and maximize the customer experience at each step in the process. Using the DocuSign Agreement Cloud to prepare, sign, store and manage the entire series of mortgage documents gives Guild customers extra visibility into the agreement chain as well as status updates on any specific document.

Before closing on a mortgage, consumers receive a series of documents digitally that they can review and sign electronically in advance of the closing transaction. That reduces the amount of documents that need to be discussed and signed in that transaction, allowing the consumers to focus on any specific documents or questions. The result is a streamlined closing with a customer experience that is far less intimidating and more enjoyable.

“DocuSign’s system of agreement is so flexible that I can’t remember a time when DocuSign wasn’t able to come up with a solution for a need of ours.”

Lisa Klika
Chief Compliance Officer
Guild Mortgage

Business-to-business sales

Every organization that needs to accelerate revenue and improve customer experience can start by streamlining its agreement processes. Today's leaders are using automation and digital transformation to move sales agreements to an intelligent cloud environment.

Flexential automates quote and contract processes with the DocuSign Agreement Cloud for Salesforce

Faced with increasingly complex contracts and a merger that united two separate sales processes, Flexential knew it was time to replace its outdated selling system. A homegrown quoting system and third party contact lifecycle management tools were stalling negotiations with manual data entry and high rates of error. The team knew it was time for a transformation.

To increase the efficiency of the combined sales team, Flexential rolled out DocuSign eSignature and CLM for Salesforce Sales Cloud and CPQ. "With DocuSign, we were able to absorb the two companies' agreement processes and see better efficiency with reps never leaving Salesforce," senior director of operations Jason Rader said. By integrating DocuSign and Salesforce, reps can create highly complex quotes then send them to customers with a single click. As the reps negotiate those agreements, they can easily track live status updates along the way.

Now that Flexential has an all-in-one solution within Salesforce, the sales process is centralized, accessible and transparent. With a cutting-edge system of agreement, Flexential has eliminated the risks of lost contracts, increased partner sales by authorizing appropriate access and improved management of upcoming renewals. All of this has translated to better experiences for the sales team and, most importantly, customers.

Results

25% +
reduction in sales cycle

Zero
document errors

75%
fewer manual transactions

80%
of the Quote-to-Cash Ops
time refocused on higher
value activities

“DocuSign has shortened our sales cycle by at least 25% in large part because we now use DocuSign CLM to create our contracts instead of copying and pasting custom product details and other terms. It’s also especially convenient for our customers who are always on the move because they can securely sign anywhere, 24x7.”

Cheryl Kleiman
Regional Vice President of Sales
Flexential

Refinitiv commits to a digital transformation with DocuSign Agreement Cloud

Refinitiv is one of the world's largest providers of financial markets data. That industry moves fast, and a manual selling process that relied on a combination of manual handoffs, scanning, faxing, mail delivery and wet ink signatures was creating difficulties for sellers. It was taking Refinitiv weeks to handle the paperwork processes to close new deals. Head of business process management Alan Bronowicz said, "Our customers literally would say to us, it's hard to buy from you. You don't even make it easy to buy from you. And we want to."

Refinitiv needed a digital transformation. After collecting feedback from customers and employees, the company built a process around an integration between DocuSign Agreement Cloud and Salesforce. The customers wanted speed, transparency and a simplified digital workflow. Sales employees wanted to stay in the Salesforce environment to create and send quotes. The Agreement Cloud delivered on all of those needs.

The new digital sales process has ushered in a 20% increase in customer experience and a rapid adoption among the sales team. Director of digital transformation Eileen Kelly underscored the importance of DocuSign: "For our sales people, if it's a sales close week, if you're not using DocuSign, you're not really looking to make money that week."

"The DocuSign Agreement Cloud makes it easier for our customers to do business with us, it makes it easier for our staff to do business with our customers, and it makes it easier on the environment, so it's a win for everybody."

Alan Bronowicz
Head of Business Process Management
Refinitiv

Business-to-consumer sales

Today's consumer lives in a world of nonstop information, any interruption or complication in that service can be a customer experience disaster. With such broad audiences, DocuSign customers are changing transactions on a massive scale.

T-Mobile radically simplifies customer experience with the DocuSign Agreement Cloud

At the core of T-Mobile's "uncarrier revolution" was a basic question: What do customers want? CIO Cody Sanford and his team set out to answer that question as simply as possible and reimagine the product as if starting over from scratch. What T-Mobile uncovered was that most customers were using their phones to connect to the internet and experience life through a smartphone the same way they had previously used a desktop computer.

The next step was to make that internet connection as easy as possible for customers to purchase and use. Together with DocuSign, T-Mobile built a fully digital lending process that can be completed quickly on a device in any T-Mobile location. The result is mobile experts who are untethered from traditional point-of-sale terminals and an improved customer experience that eliminates time, paper and needless complexity.

Before, T-Mobile team employees were printing out around seven pages for each contract, which had to be read and signed by a customer to complete a sale. The digital sales process ushered in by the uncarrier revolution condensed that to a single page that could be viewed and signed on a tablet. It saved an estimated four minutes per transaction. With each location competing 50-100 transactions per day, that time adds up to significantly improved interactions between sales experts and customers.

Comcast Business takes the paperwork out of field sales transactions

A critical part of the Comcast Business strategy is field sales representatives to go door to door and have personal conversations with customers and prospects every day. This model was successful at creating connections with the local business community, but each sale required the sales rep to return to the office and prepare and print a contract then return to the customer for follow-up negotiations and signature collection. The process was doubling the time necessary for the reps to do business, not to mention increasing printing, faxing, scanning and filing expenses.

To modernize field sales, Comcast Business equipped field reps with sales collateral and DocuSign. In a single meeting, these sellers could initiate the conversation, walk through a presentation and sign a contract. The DocuSign Agreement Cloud enables Comcast Business to skip wasteful keystroking processes and manual data reentry by populating account information directly from Comcast's CRM tool.

Under the updated system, field sellers have reduced the average number of meetings required to obtain new customers by more than 50%. Those reps are using that extra time to talk to more customers, meet new clients and solve their business needs. Senior vice president Terry Connell said the efficiency has enabled the company to rapidly scale field sales. "We are in a rapid growth mode," Connell said. "DocuSign is one of the tools that allows us to thrive and enables us to drive that kind of growth."

“DocuSign gives reps the ability to meet with a customer, draw up a proposal and contract right there, and sign on the tablet in just one meeting.”

Terry Connell
Senior Vice President
Sales & Sales Operations
Comcast

Human Resources

Internally, organizations use agreements to help define relationships with their most important assets – employees. Cutting-edge HR teams are simplifying the new hire experience to improve employee morale and increase productivity.

Digital Identity revolutionizes modern onboarding

Onboarding is one of the first touchpoints an organization has with a new employee. It establishes the tone for the relationship between the two parties, contributing to better new hire retention and productivity. A critical part of the onboarding process is the I-9 form, which requires new hires to provide a government ID to verify their identity. This document is then taken from the employee to be copied, scanned and stored. Depending on the speed of the process and the number of new hires, this identity validation can take a few hours to several days. Withholding an employee's ID documents for too long is an easy opportunity to sour their onboarding experience.

DocuSign Identify is a solution to this painful workflow by combining eSignature with ID Verification. New hires can fill out and sign I-9 forms electronically and the HR team can instantly analyze for document security features and match a name on an agreement against the name on the ID. Information from the ID document can also be saved for later use and electronically attached to the new hire's profile. The entire process can be completed in minutes. The HR team benefits too, avoiding the manual printing, scanning, copying and filing of ID document information to spend more time building relationships with new employees.

Facebook streamlines rapid employee expansion with DocuSign CLM

As an extremely fast growing company, Facebook's HR team was onboarding around 50 new hires per week. That activity required around 60% of the team's time, giving them fewer resources to dedicate to existing employees and other HR responsibilities. Completing paperwork also took up a large percentage of new hires' time, reducing their time available to learn about the company and how specific teams operated.

At the core of this time-consuming process were paper documents, manually filled out by new hires and hand-delivered to the HR and payroll departments. Not only were these processes inefficient, they also created errors and missing or inconsistent data. As one of the biggest and most important technology companies in the world, Facebook sought to lead the way with paperless digital workflows.

To do that, Facebook chose DocuSign CLM to move their documents to the cloud and create an easily searchable and secure repository for all HR paperwork. DocuSign fully integrates with existing systems – including Salesforce, Workday and ADP – and setup took less than four weeks in the U.S. The new process generates digital offer letters that can be signed electronically. Once offers are signed, new hires are given access to a digital HR portal where they can view and sign all onboarding paperwork.

Results

93%

of Glassdoor's Top 15 "Best Places to Work" in 2019 are DocuSign customers

350 +

integrations with leading HRIS like Workday, SAP, Oracle, Greenhouse and more

75%

fewer manual transactions

82%

of agreements are completed in less than a day

50

new employees onboarded per week

20-40

hours saved per week

200,000 +

documents digitized

Regulated industries

Some industries have agreement processes that involve additional layers of external approval and government regulation. Financial institutions and health care providers specifically have several regulatory hurdles to navigate in day-to-day operations, so agreement processes are more complicated.

Santander streamlines account opening and loan processes with a digital transformation

To improve outdated, inefficient loan processing workflows, Santander's UK's SME, Commercial and Corporate Banking teams embarked on a digital transformation. At the heart of this evolution were two critical customer pain points: a complicated onboarding process and too long of a waiting period before the availability of cash.

Using the DocuSign Agreement Cloud, Santander digitized the forms required for these processes, allowing customers to complete documents without coming into a branch. Before the digital transformation, new customers would complete one of 39 unique PDF forms before printing, signing and mailing it back to a local branch. This process averaged around 12 days to complete. By replacing those PDFs with a dynamic online form and utilizing parallel processing to complete other checks and collect various signatures, the account opening process was reduced to just two days.

Using DocuSign CLM and an integration with nCino, the conditions for a new credit deal are proposed and priced before moving seamlessly into DocuSign for negotiation between the bank and an applicant. Using a series of automatic triggers, other back-office processes happen in parallel so that the electronically signed contract is met with ready funds. By keeping the process in one system from end to end, Santander ensures that customers are getting their loan funds as quickly as possible.

Affordable healthcare financing with DocuSign eSignature for Salesforce

American Healthcare Lending (AHCL) is a financial services company that serves healthcare providers and patients nationwide. Its mission is to "Make Healthcare Affordable™" by contracting with healthcare providers and offering a technology platform that sits between patients and sources of financing. Unfortunately, AHCL was managing these relationships with 20-30 page contracts that required printing, faxing, signing, scanning and mailing.

Results

Before DocuSign

After Docusign

39

editable PDF forms
across many products

12 days

average time for new
customers to open an
account

1

dynamic online form

2 days

average time for new
customers to open an
account

“Collecting signatures while completing front and back office processes enables us to offer a customer experience that outperforms even digital-first banks.”

Jonathan Holman

Head of Digital Transformation
Santander Corporate & Commercial

AHCL's COO Nick Sorensen looked for a better way to complete contracts. With a focus on agreements that integrated with Salesforce, he chose to move fully digital with DocuSign. The new agreement workflow has eliminated costs associated with paper contracts, accelerated processing by automating manual steps and ensured contract accuracy. Beginning with its inside sales team, AHCL implemented DocuSign eSignature to streamline the sales process by digitally organizing contracts and easily obtaining customer signatures. Since implementing DocuSign eSignature for Salesforce, AHCL reports more than 2500 annual digital transaction requests and calculates a savings of more than \$90 per contract.

After success with sales agreements, AHCL expanded eSignature usage to human resource processes, channel partner programs, employee onboarding and product development processes. With DocuSign, AHCL is positioned to meet and exceed quarterly sales goals and company objectives because of digital agreement processes.

Public Sector

Traditionally, public sector organizations are not at the forefront of new technology. However, DocuSign customers in this arena have made improvements in agreement processes that have dramatically improved their ability to serve the public.

Metro Nashville Public Schools streamline purchasing by 86%

With 153 public schools that educate 85,000 students annually, Metro Nashville Public Schools (MNPS) is one of the largest school systems in the entire U.S. Outdated manual processes were taking an average of 85 days to obtain all the signatures required to complete vendor contracts. Those long delays introduced inefficiencies and made school system personnel wait far too long to receive materials and services they needed. Each purchase required around 15 reviewers or signers, generated two to six carbon copies and relied on postal delivery services for delivery.

By upgrading to the DocuSign Agreement Cloud, director of purchasing Gary Appenfelder and his team reduced that process to only 12 days. The new process has streamlined purchases and automated important status checks along the way. "DocuSign has many subtle but important features in areas like security, templates, tracking and reporting that add up to a big difference in the productivity of the people using it and why they emerged as the global standard," Appenfelder said.

Because the process is now faster and more efficient, Appenfelder's team is able to execute over 500 contracts per year, more than double the total from previous years. The efficiency gains allow the MNPS team to respond to needs with more agility and better serve the students of the Nashville community.

AHCL's Results

200%

Increase in customer payments

\$90

Saved per contract

55%

Reduction in time to obtain signatures

"We expected that DocuSign would speed contract processing and increase the number we execute per year, but the amount of improvement blew our socks off. DocuSign delivered far more dramatic results than we ever imagined."

Gary Appenfelder

Director of Purchasing

Metro Nashville Public Schools

Governments respond to COVID-19 by improving agreements

As we celebrate the 20th anniversary of ESIGN, the world is fighting the outbreak of the COVID-19 pandemic. Governments across the world are racing to increase agility and keep up with the needs of the people they serve. Public sector programs in more than a dozen U.S. states have connected with DocuSign to discuss using eSignature to manage a wide range of routine services – contracting work, employment facilitation, medical consent forms, supplier agreements, special education plans, legal proceedings and more – with a remote workforce. These services fulfill basic needs for citizens and it's important that any changes to public sector workflows avoid operational lapses. DocuSign has also been at the core of new rapid response initiatives involving medical supply orders, Veterans Affairs policies and unemployment benefits.

Processing paperwork related to healthcare patients and suppliers is an especially important function of public sector work. To manage these, DocuSign's public sector customers at the federal, state and municipal level have been building processes that utilize PowerForms (a feature that automatically pulls data from connected systems) and Guided Forms (a feature that adapts new questions based on previous answers). With PowerForms, citizens can complete a form or application digitally and trigger a self-service workflow that ends in a successful electronic signature. This minimizes the effort public sector workers spend preparing agreements and collecting information, letting agencies put more effort into distributing important resources to the public.

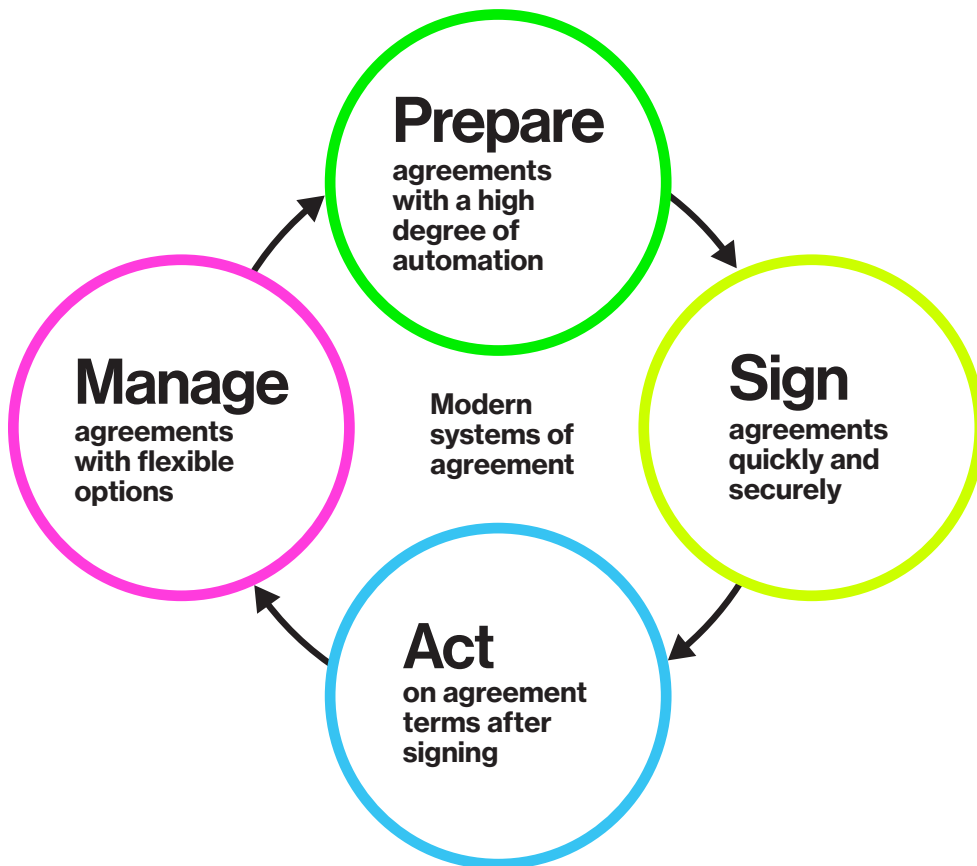
Some state agencies have even put a HIPAA Business Associate Agreement (BAA) in place for the state. This allows them to collect and store confidential information like social security numbers using DocuSign. A state having a HIPAA BAA in place allows all agencies to manage agreements related to use cases with highly sensitive information.

Your contract processes can be more agreeable

The last 20 years have seen phenomenal improvements in the way organizations and their customers do business. Thanks to guidelines established in E-SIGN, digital signatures have been at the forefront of several crucial digital transformations. The stories in this ebook prove that digital signature technology is a vital part of the customer experience.

As exciting as the past 20 years have been, the benefits of digital agreements will only continue to expand with increased adoption of innovations like the DocuSign Agreement Cloud. By improving the system of agreement – the way organizations prepare, sign, act on and manage agreements – organizations across the world will eliminate paper, automate processes and connect systems together. The best way to celebrate this anniversary of E-SIGN is to imagine future possibilities and act boldly to agree better.

[Learn more about the DocuSign Agreement Cloud.](#)



About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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