DocuSign®

Automate Agreements and Book Business Faster with DocuSign and Vertafore

Digital engagement is rapidly becoming a must-have for insurance agencies as consumers grow increasingly accustomed to transacting online. To address this need, agencies must wed their comparative advantages in personal service and expertise with the exceptional ease of use and access inherent to the digital channel. DocuSign eSignature is integrated with Vertafore's AMS360, QQCatalyst, FinancePro and Sircon platforms to help agencies easily digitize their agreements and signature collection processes. With this integration, agencies can easily send, sign and manage insurance agreements without ever leaving their management system. The result is enhanced agent productivity, satisfied customers and faster bookings.

How it works

Send
Select agreements and attachments to send for signature from management system.

Sign
Tag agreements, edit recipients and set automated reminders. Workflows can be set up to send multiple agreements to multiple signers in a single envelope.

Manage
Track activity on agreements out for signature. Once signed, agreements are automatically filed in management system.

Benefits

Ease of setup and adoption

Get up and running quickly without the need for dedicated IT resources. Leverage a large ecosystem of agreement experts to ensure a successful deployment with on-demand, always-on support.

Enhanced agent productivity

Eliminate the chase for signatures and allow agents to focus on what matters the most: advising their customers. Automated reminders and a record of envelope activity simplifies tracking for agents.

Satisfied customers

Deliver a superior experience to customers with the top-rated mobile signing app. Customers can easily sign documents on practically any device, from almost anywhere, resulting in faster closed business.

Improved security and compliance

Each signed agreement is accompanied by a digital audit trail and a DocuSign Certificate of Completion, containing a summary of the signer, the signing event, and the date, time and IP address when the document was viewed and signed. Manage compliance requirements with a variety of methods to verify a signer's identity, combined with industry leading security certifications, the strongest encryption technologies available and 99.99% uptime.

Let's get started

Contact sales to learn more about this integration and get started.