DocuSign®

Boost Profits, Delight Customers

Agreements are everywhere in the insurance industry from new business policy applications to claims and servicing requests. Most processes and systems to obtain these agreements were improvised rather than designed. As a result, they're needlessly slow, costly, and cumbersome for both employees and customers. DocuSign helps simplify and speed up agreement processes, allowing agents, brokers, and employees to focus on what matters most— the customer.

Improve customer experience

Deliver a convenient, multichannel, and truly satisfying mobile-first customer experience by automating agreement workflows throughout all your core insurance operations.

Accelerate policy and claims management

Close business faster and expedite claims settlement by automating workflows and enabling customers to complete and sign documents in minutes.

Minimize risks and reduce operational costs

Securely identify and verify signers before processing agreements. Minimize not in good order (NIGO) risk with a guided signing process.

Meet compliance and regulations needs

Accurately and efficiently capture authorization to minimize the risk of fraud and non-compliance; stay compliant with digital audit trails; and find and analyze risk in your agreements using AI technology.

Reduce IT costs and enhance time to value

Implement solutions to digitize your agreement processes within weeks and not years. Pre-built connectors and easy-to-use open APIs allow you to simply plug into existing core solutions, like Guidewire and Salesforce, further automating document generation and sharing processes.

15 of the top 15
Fortune 500 financial companies

Over 1,400
life and property and casualty agencies leverage DocuSign

Results

85% reduction
in time to complete a new business application
AAA of Washington

312% ROI
and $10 saved on every paperless enrollment
Philadelphia Insurance Companies

30%
office space recouped by digitizing documents
Mercury Insurance

150 signatures
digitally captured per month
Downeast Insurance

"We're actually selling more than we did prior to DocuSign. After six months of data, we were able to show that the agents who used DocuSign sell more business because they have more time to sell."

Chris Lavin
AAA of Washington
Field Agency Sales Specialist

The DocuSign Agreement Cloud for Insurance

It used to be that you had to compromise customer experience to remain compliant. Those days are gone. Rising consumer expectations are shaping the future of the insurance industry. As carriers and agencies vie to retain clients and capture new ones, they're turning to digital technologies to streamline key policy and claims procedures. The DocuSign Agreement Cloud integrates seamlessly into existing processes, streamlining workflows and lowering costs, all while increasing compliance and reducing the time to complete key interactions, allowing you to deliver the right experience, right now.

eSignature

Securely send and sign policy or claims agreements and disclosures electronically, and maintain a complete audit trail. Reach policyholders faster with SMS notifications and simplify claims submissions with drawing and mark-up capabilities to document damage.

Guided Forms powered by Intelledox

Turn complicated policy applications and claims intake into intuitive "wizard-style" interviews to capture customer or policyholder information.

DocuSign CLM

Manage the full agreement lifecycle from automated generation to real-time negotiation to storage and search for complex underwriting and claims documents.

Identify

Secure access to agreements for new policies and claims submissions by choosing from a suite of proven authentication and ID verification options.

Integrations

Easily embed DocuSign into platforms where insurance work is done with 350+ pre-built integrations, such as Applied Epic, Salesforce, or Guidewire.

Notary

Sign and notarize documents remotely and electronically via a secure audio-visual session. Mitigate risk with a robust audit trail that includes a tamper-evident recording and electronic journal.

To learn more, go to docusign.com/insurance

Use case examples

New policy sales	**Servicing**
Insurer application form	Policy cancellation authorization
Disclosures and policy options	Issue resolution notification (SLA)
Coverage selection and payments	Premium change notification
Underwriting documents	Beneficiary updates
Claims	**Audit and compliance**
Claims request	Digital identification to authenticate claim
Claims exceptions	Underwriting audits
Dispute notices	Digital audit trails
Total loss	**Agent experience**
Uninsured/ underinsured	New policy
	Onboarding
	Policy management
	Licensing documents

"When COVID hit and we closed our doors, DocuSign saved our lives. If it weren't for the ability to get an electronic signature, we wouldn't have written half the new business we did last year."

Stacy Johansen
President
Downeast Insurance

DocuSign Agreement Cloud