



DocuSign®

Optimize Customer Experience with DocuSign

Solution Brief

Financial Services & Insurance

Today's financial services and insurance providers (FSI) are facing heavy pressure to increase revenue. The market is unpredictable, competition is steep and new fintech startups are emerging to compete with established players.

The competition for wallet share has quickly turned into a race to appeal to new customers. The most valuable prospects are members of younger generations (millennials and Gen Z), who offer the potential for a long relationship. However, these younger clients are accustomed to a digital-first consumer environment and have high expectations for FSIs. To appeal to them, the traditional service delivery model has to be entirely rebuilt.

According to [Salesforce's The Future of Financial Services](#), only 25% of customers are satisfied with the apps and websites of their current insurance/wealth management provider. Since more than 40% of new customers are initiating FSI relationships on those platforms, it's important to improve the digital customer's experience.

Across all types of financial services, ease of use tops the list as the most common reason customers switch providers. As FSIs modernize their services, the most important area of focus should be reducing customer friction and delivering a convenient, personalized cross-channel experience. The right investments in this area will ensure better customer satisfaction, lower abandonment rates and accelerate new business.



Optimizing digital agreements

The critical first moments in the relationship between FSI and their customers all take the form of agreements: account opening, policy issuance, investor onboarding and more. Throughout the customer lifecycle, they are met with more documentation to catalog routine activities like profile changes, beneficiary updates and funds transfer. From the customer's perspective, their relationship with an FSI is as good as their relationship with those documents.

A good first step in the digital transformation of FSI agreements is to replace paper forms with electronic documents. But there's more work to do. Digital documents open up a range of new capabilities and customizations. Innovative FSIs are integrating digital agreements into new channels to meet customers where they are and give them more options to personalize their experience. There's a generation of digital natives who interact exclusively on nonpaper channels (text, social, chat, app). If you're simply recreating the paper experience on your web page, you'll miss connecting with all of them.

To come out ahead of the competition, FSIs need to build a best-in-class customer agreement experience that delights customers no matter which combination of channels and devices they use. They want personalized high-touch support for some transactions and self-service completion for others. Giving customers the power to create their own agreement journey is key to developing a strong relationship and securing long-term revenue.

“Companies that invest in their customer experience outperform those that don't by nearly 80%. ”

Eran Agrios
SVP & GM, Financial Services
Salesforce

DocuSign simplifies customer agreements

“If it weren’t for us having the ability to get an electronic signature, we wouldn’t have written half the new business we did last year. We could take a credit card over the phone and get a signature in two seconds—no matter where the customer is. ”

President
[Downeast Insurance](#)

“Most consumers these days just expect text to be the way business operates, so [SMS Delivery] was an awesome enhancement. DocuSign has always been easy, and that’s what we love most about it. ”

Vice President of Payments
and Deposit Operations
[JAXFCU](#)

“We’re looking to digitize to create a better, faster, more consistent customer experience. DocuSign is part of a suite of solutions that’s helping us achieve that. ... [Notary] provides a better experience for our customers because they can do it from the comfort of their homes. ”

Vice President, Enterprise Transformation Office,
Program Manager eSignature & Delivery
[M&T Bank](#)

“It’s no longer like pulling teeth to get people to sign off on documents. They often do it from home using whatever device is handy. ”

Client Service Manager
Merriman Partners

DocuSign solutions to improve digital customer experience

Signing use cases

Loan applications
Account opening forms
Policy applications
Claims submissions
Account maintenance forms
Beneficiary changes

Notarization use cases

Powers of attorney
Spousal consents
Deeds of trust
Lien releases/waivers
Total loss forms
Trust certificates

Out-of-the-box mobile:

- **SMS Delivery:** Instantly reach signers with important agreements delivered via text message
- **Responsive Signing:** Improve mobile readability and eliminate pinch-and-zoom by adapting agreement displays to fit signer devices
- **Smart Sections:** Expedite reviews and streamline lengthy agreements by collapsing noncritical content

Intuitive self-service:

- **PowerForms:** Enable signers to initiate forms by embedding simple self-service documents into your website or outreach environment
- **Web Forms:** Deliver interactive form-filling experiences that change dynamically based on user input and populate data into agreements for signature

Custom in-app experience:

- **Elastic Signing:** Deliver personalized signing experiences that seamlessly blend into your applications and websites

Guided virtual:

- **eSignature for Zoom:** Enable customers to interact with agents, advisors and more via face-to-face signing experiences over Zoom

Beyond eSignature:

- **Notary:** Enable customers to securely and remotely notarize documents without the hassle of meeting a notary public in person
- **Supplemental documents:** Consolidate documents for customers by including supporting materials that do not require signature (e.g. compliance disclosures and privacy policies) as a distinct part of a signing envelope

To learn more about how your team can improve customer experience with better agreements, check out [DocuSign for Financial Services](#)



DocuSign®

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, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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