

Accelerate business with your independent insurance agency network

Independent insurance agencies are a vital distribution channel for insurance carriers, but the agent experience of securing new business for carriers is often onerous. Carriers rely on agents to send their customers the correct policy and trailing documents in a complete and timely manner. This process can be fragmented and highly variable from agency to agency -- leading to potential for errors, frustrated agents, and delayed business transactions.

DocuSign Joint Agreements is the trusted way to accelerate business growth and minimize errors with your agency network.

Streamlined agent management

Eliminate tedious tasks and improve efficiency.

- Link your DocuSign Account with your independent agency network and manage all your agency relationships on DocuSign in one place
- Reduce administrative burden on your agents
- Set up document control and versioning so your agents will automatically use the latest versions of frequently used disclosures

The screenshot shows the 'Network Configuration' settings page in the DocuSign eSignature interface. The page title is 'DocuSign eSignature' and the user is logged in as 'Tally Insurance' (Account ID: 6483702). The page has a navigation menu with 'Home', 'Manage', 'Templates', 'Reports', and 'Settings'. The main content area is titled 'Network Configuration' and includes a 'Switch to...' button. Below this are 'SAVE' and 'CANCEL' buttons. The configuration options include: 'Configuration Name' (text input), 'Notify Admins of a new partner request' (radio buttons for 'Send to all Administrators' and 'Do not send'), 'Designated Recipient' (dropdown menu), 'Display Name' (text input), and 'Require Recipient Authentication (optional)' (checkbox). Under 'Authentication Options', there are checkboxes for 'SMS Text Message/Phone Authentication', 'Knowledge Based Authentication (KBA)', 'Access Code', and 'ID Verification'.

Accelerate transaction speed

Increase straight-through processing and reduce human errors.

- Expedite agent delivery of signed policies within the 30 day binding period
- Trigger actions off completed documents
 - Archive, monitor, and act on real-time events between you and your agency network
 - Reduce not-in-good-order forms
- Ingest envelope data for downstream workflows
 - Data fields from PDF forms are extracted as dynamic fields that can feed into downstream processes

The screenshot shows the 'Trigger Events' settings page. It is divided into two sections: 'Envelope Events' and 'Recipient Events'. Under 'Envelope Events', the checkbox for 'Envelope Signed/Completed' is checked. Under 'Recipient Events', the checkboxes for 'Recipient Sent', 'Recipient Delivery Failed', 'Recipient Delivered', 'Recipient Signed/Completed', 'Recipient Declined', and 'Recipient Authentication Failure' are all unchecked.

Enforce compliance and mitigate risk

Set controls on agency-sent envelopes to support internal compliance requirements.

- Protect your policy agreements and customer PII with easily applied identification requirements
 - Verify the identity of the signers with your approved methods such as identity verification, knowledge-based authentication, or multi-factor authentication
 - Support compliance requirements such as KYC and AML
- Verification and consent status is recorded in the eSignature Certificate of Completion for compliance and audit purposes
- Enforce document visibility so you only see your own documents, limiting risk of exposure
 - On envelopes with multiple files, receive only the documents within the envelope that need to be shared with your company
- Require agents to use approved T&Cs, privacy policies, and disclosures for every envelope with your carrier documents
- Capture customer consent with a single click, at a document-level within agreements

Use cases

Policy Sales:

- Policy applications
- Payment forms
- Exclusions and other trailing documents
- State-specific disclosures

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

Set signing order

Tally Financial requires recipients have a phone number for SMS authorization.

Name *
Sarah Signer NEEDS TO SIGN MORE

Email *
Sarahsigns@yahoo.com

Select access authentication (Required by Tally Financial) Close

SMS Text Message +1 Phone Number*

Name * LINKED ACCOUNT RECEIVES COPY
Tally Financial (Linked Account) Can access 2 Documents

Name * LINKED ACCOUNT RECEIVES COPY
Acme Investments (Linked Account) Can access 3 Documents

ADD RECIPIENT

Services

Leverage our proven approach to success with comprehensive **implementation and adoption services.**

- Digital onboarding experience
- On-demand and self-paced training
- Configuration and rollout expertise

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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