



CASE STUDY

DocuSign Digital Transaction Management Boosts Revenues, Saves Time and Costs, and Enhances Security for Sattler Insurance

Summary

- Avoided need for a new hire
- Saved an hour a day per 4 staff members previously spent on administrative tasks
- Shortened the 2-month contract renewal process by 1 to 3 weeks

Sattler Insurance wanted to speed its paper-intensive business processes, save the labor spent on administrative tasks, enhance security, and increase customer satisfaction — all with a positive impact on the bottom line. By implementing DocuSign's Digital Transaction Management platform, the company accomplished all this and more. Sattler's salespeople are spending the time they save in the best possible way — by selling to and serving more clients.

Challenge

Sattler Insurance is a Lewiston, Idaho-based company that provides auto, home, business, and life insurance, catering especially to the outfitter and guide market nationwide. Documents of all kinds — applications, renewals, benefit statements, and more — dominate daily life at Sattler. These documents are subject to strict legal regulations requiring protection of personal information and have stringent signature requirements.

In the past Sattler emailed documents to customers who had to print and sign them, and then either fax or scan and email them back. For the Sattler staff this was time-consuming but for customers it was not just tedious — it was daunting. Outfitters in remote regions often lacked printers, fax machines, and scanners; and even when these devices were available the quality was often poor. Some relied on mail that came only once a week.

Signup and renewal processes were so intimidating that many customers were forever putting it off, forcing Sattler to make repeated reminder calls, sometimes down to the last minute. Errors, incomplete or illegible



“Like any insurance company, it's critical that we employ the utmost in security when we transmit personal information such as social security numbers. DocuSign's strength in security was the number one reason we adopted the company's Digital Transaction Management platform.”

Nancy Sattler
Principal Owner,
Sattler Insurance

documents, and missed deadlines often resulted, lowering productivity further for Sattler staffers. “Our people were spending an hour a day on administrative tasks, and even then they were having trouble keeping up,” said Leslie Vannoy, a partner and principal of the firm. “We were working evenings and Saturdays during our busy season of February through July, but it still wasn't enough. It was looking like we needed to hire an additional person just to deal with the paperwork to run our business.”

Pressing as these issues were, there was even bigger concern — security. “With the regulations we face, the errors, missing documents, and potential personal information exposures were really scary,” explained Nancy Sattler, principal owner of the firm. “We responded with security measures like complex passwords that proved painful for both customers and staff members and still weren't adequate. We knew we needed a better way. That's when I visited another



agency facing similar challenges and discovered all of the benefits of keeping business digital with DocuSign.”

Solution

The company examined DocuSign closely before making its decision. “We really liked how DocuSign makes sure all the legalities are followed,” said Tyler Martin, commercial lines sales executive for Sattler. “We were also impressed by DocuSign’s strategic partnership with our insurance agency software provider Vertafore and its NetVU user group, as well as many other major organizations both inside and outside the insurance industry. It’s clear that DocuSign is the Digital Transaction Management standard in the insurance industry.”

Implementation was straightforward. Sattler built templates for its common documents and took advantage of the DocuSign DTM platform’s advanced workflow capabilities. Customers and staff members alike have found the improved processes fast and easy to follow. Every employee uses DocuSign, and 99% of customers use it as well.

Results

DocuSign has been a big win for Sattler Insurance and its customers. With the staff time savings there is no more talk of needing to hire another person to cope with the minutia. “That by itself offsets the investment in DocuSign many times over,” said Vannoy. “DocuSign is also helping to spread the workload more evenly throughout the year, easing the impact of the busy

season that used to require so much overtime work – which provides more savings. The clincher has been the way DocuSign automatically sends reminders to customers – so we don’t have to. The entire staff jumped on board when they heard that.”

Customers are finding Sattler’s new processes so pleasant that they often perform them immediately, accelerating contracts and speeding time to revenue. In addition the sales staff, free from the burden of chasing down paperwork, is spending the extra time following up on new leads and serving existing customers. “Sales are growing handsomely, and we attribute at least 10% of that growth to the fact that with DocuSign our people have more time to sell,” says Martin. “This was just in the first year. As we integrate DocuSign further into our processes to fully digitize our business, and as we take advantage of its recently announced integration with Vertafore, we expect our ROI to grow even larger.”

DocuSign also helps management sleep easier at night. “We always know exactly where in the process each document stands, and when it gets completed,” says Sattler in conclusion. “There’s no more forgetting to mail back a page, no more missed steps, and no more ‘lost mail.’ Plus we get great documentation about the signature process for our records. DocuSign has transformed the way we do business and has made us a more streamlined company.”

About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management™. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.

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