



NEWS RELEASE

## DocuSign and Vertafore® Partnership Extends Efficiencies for Insurance Agencies Nationwide

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Integrated Solution from DocuSign & Vertafore Now Available to Help Agents Drive Productivity, Reduce Costs

- DocuSign and Vertafore® have partnered to help the insurance industry go fully digital to complete business faster, increase security and compliance, and create a better client experience.
- New integrated solution is designed to help insurance agents save time and money when preparing, executing and managing documents that require client signatures.
- DocuSign and Vertafore eliminate the hassles, costs and lack of security in printing, faxing, scanning and overnighting documents for signature so agents can earn revenue faster while delighting clients with a 100% digital workflow.

SAN FRANCISCO and BOTHELL, WA – January 27, 2015 – DocuSign Inc. (DocuSign®) and Vertafore® today announced the availability of a DocuSign-powered eSignature solution for insurance agents leveraging the Vertafore Agency Platform™ and AMS360® online offerings. The integration empowers insurance agents to accelerate the speed of transactions to earn revenue faster, reduce costs and increase security and compliance – all while offering a better client experience.

The new solution is a result of Vertafore's partnership and technology integration with DocuSign's Digital Transaction Management (DTM) platform. Agencies seeking to leverage these capabilities may access them via the Vertafore Agency Platform <http://www.vertafore.com/All-Products/Vertafore-Agency-Platform>, and AMS360 <http://www.vertafore.com/All-Products/AMS360>

A recent study from the IIABA revealed that approximately one-third of insurance agencies have realized cost savings from using paperless communications,

<http://www.independentagent.com/Resources/Research/SiteAssets/AgencyUniverseStudy/agency-universe/R63-2014-Agency-Universe-Study.pdf>.

A similar proportion feels insurers are equally receptive to e-documents and paper documents. In addition to cost savings, early adopters of the joint DocuSign and Vertafore solution identified key benefits including eliminating hours of busywork each day for staff, shortening contract renewal timelines, and avoiding the need to hire additional personnel to manually manage these processes.

Today's integration comes at the same time Vertafore revealed the newest version of the Vertafore Agency Platform. In addition to adding DocuSign's eSignature solution, Vertafore Agency Platform 2015 is now integrated with Vertafore's other leading technologies, PL Rating and ReferenceConnect®, making it the only offering on the market that combines solutions for benefits, comparative rating, document management, licensing and compliance and reference capabilities in a single platform. Agencies looking to access the new version of the Vertafore Agency Platform can take the next step here <http://www.vertafore.com/onescreen>. Representing 96 of the nation's top 100 insurance agencies, and more than 20,000 agencies and carriers industry wide, Vertafore's latest release connects the insurance industry with more than 106 million transactions between agents and carriers and 16 million licensing and compliance transactions in the last 12 months.

#### QUOTES

- "DocuSign's industry-leading eSignature solution enable our agents to move faster while decreasing errors, and allow us to increase our revenue by more than 10 percent," said Nancy Sattler, principal owner, Sattler Insurance. "Together with the Vertafore services our agents love, the two platforms are making an even bigger impact by giving our agents everything they need in one place."
- "Vertafore's market-leading solution portfolio and customer growth made it an ideal partner to help us expand our leadership in serving the insurance industry," said Miles Kelly, senior director of industry and departmental marketing at DocuSign. "Initial adoption of this technology by the insurance industry has been impressive. As widespread implementations of the DocuSign and Vertafore integrated solution continue, together we're helping to lead the digital transformation of the insurance industry."
- "The insurance industry is extremely relationship-centric and it's imperative for agents on-the-go to be able to access what they need outside the office to avoid being tied down by paperwork," said Greg Wright, senior vice president of agency management systems at Vertafore. "Our partnership with DocuSign has enhanced the day-to-day operations of modern agents, enabling an end-to-end digital experience. In an industry known for lagging in its adoption of technology, we're proud to be an advocate for driving change and encouraging the implementation of the best solutions available, like DocuSign's eSignature solution."

As the official eSignature partner to the Big 'I' and its 250,000 members, DocuSign is helping Vertafore drive a digital

revolution in the insurance industry with its industry-leading DTM platform. In addition to serving 12 of the 15 top U.S. insurance carriers, leading insurance organizations trust DocuSign's DTM platform to facilitate customer interactions. Customers include AON, Banner Life, Kansas City Life, Pacific Life, RightSure Insurance Group, Savings Bank Life Insurance Company of Massachusetts (SBLI), SAIF, Sentry Insurance, and Starr Companies.

Individuals interested in DocuSign's integration with Vertafore may register for the company's Wednesday, January 28 webinar at <https://www.docusign.com/webinars/vertafore-docusign-get-documents-signed-in-minutes-not-days-or-weeks>, or visit [www.docusign.com](http://www.docusign.com) or [www.vertafore.com](http://www.vertafore.com).

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About DocuSign, Inc. 

DocuSign® is The Global Standard for Digital Transaction Management®. Global enterprises, business departments, individual professionals, and consumers have standardized on DocuSign, with more than 40,000 new users joining the DocuSign Global Network every day. Today, that network includes millions of users in 188 countries. DocuSign's DTM platform supports legally compliant electronic and digital signature processes tailored to meet requirements globally with localization in 43 languages. Companies and individuals DocuSign to accelerate transaction times to increase speed to results, reduce costs, increase security and compliance, and delight customers across nearly every industry – from financial services, insurance, technology, healthcare, manufacturing, communications, real estate, retail, and consumer goods to higher education, non-profit and others – as well as every business department, including sales, finance, operations, procurement, HR/staffing, legal, and customer support. For more information, visit [www.docusign.com](http://www.docusign.com) or call 877.720.2040. Visit the DocuSign blog at [www.docusign.com/blog](http://www.docusign.com/blog) and follow DocuSign on Twitter, LinkedIn and Facebook.

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## About Vertafore

Vertafore delivers cloud-based insurance software and services that transform the business of insurance. With the largest customer-base in the industry, more than 20,000 agencies and carriers leverage Vertafore's insurance solutions that are built on today's most advanced cloud, mobile, and information technology platforms. Only Vertafore offers the most complete portfolio of solutions for agencies and carriers to drive efficiencies and increase profitability – including agency management, rating and connectivity, content management and workflow, information solutions and producer lifecycle management. For more information about Vertafore, visit [www.vertafore.com](http://www.vertafore.com) and follow the company on **Twitter**, **LinkedIn**, and **Facebook**.