

# Automating the review and redlining processes, allowing Marketing and Sales complete visibility.

Aetna is a Fortune 100 managed healthcare company which sells traditional and consumer directed health care insurance plans and related services, including medical, pharmaceutical, dental, behavioral health, long-term care, and disability plans. Their Voluntary Plans division is a benefits arm of Aetna that provides add on insurance options to customers.

## Revamp an inefficient, manual process.

Aetna Voluntary needed an easier way to manage and collaborate on documents.

Aetna Voluntary was struggling with a manual process for inputting data required for quotes. Also, as part of their quote process, they needed to generate catalogs that require a great deal of review and redlining. The process was slow and often resulted in errors.

## Bottlenecks were causing delays.

The delays were costing Aetna Voluntary business and undermining growth.

Aetna Voluntary was using Microsoft Word, notes and attachments to email to complete these tasks, which tied up employees' time searching for the correct version of a document. Aetna Voluntary's existing process also created a loss of accountability and made it difficult to determine who was responsible for the next step in the process. They were experiencing extremely long wait times for getting benefits in front of customers – so much so that customers were losing interest and going to competitors. They knew they needed a Contract Lifecycle Management tool to increase their efficiency, and help them stay competitive.

## A cloud repository with visibility into processes and tasks.

Salesforce integration was key to finding the right solution.

As a dedicated Salesforce customer, integration with their CRM and CPQ tools was key for Aetna Voluntary. They chose DocuSign CLM after a recommendation from their Salesforce CPQ account executive, who knew that DocuSign CLM could provide the workflow automation necessary to support extensive redlining and a secure, central repository to speed up their quote process while reducing errors.

## Overview

### Healthcare & Life Sciences

Industry

10,000+

Company size

Hartford, CT

HQ location

1853

Founded

Contract Management

Use case

DocuSign CLM's solution automates review and redlining, allowing Aetna Voluntary marketing and sales teams complete visibility into where a document is in the process. They are no longer stuck digging through emails and waiting on responses from their colleagues. The process is much faster and takes less effort.

## **Aetna voluntary's quote process is fully automated.**

**DocuSign CLM helped them develop a seamless process to create, print and store policy quotes and booklets.**

Aetna is now using Salesforce CPQ to generate different quote prices for monthly and annual plans. They also use DocuSign CLM to generate the policy booklets with standard and customized language. After review is complete, DocuSign CLM automatically sends the document to a 3rd party printer that produces and mails the booklets directly to Aetna Voluntary's customers. A searchable, electronic copy of each booklet is tagged and stored within DocuSign CLM for online access by customers and Aetna employees.

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### **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, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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