

# Agree & Sign

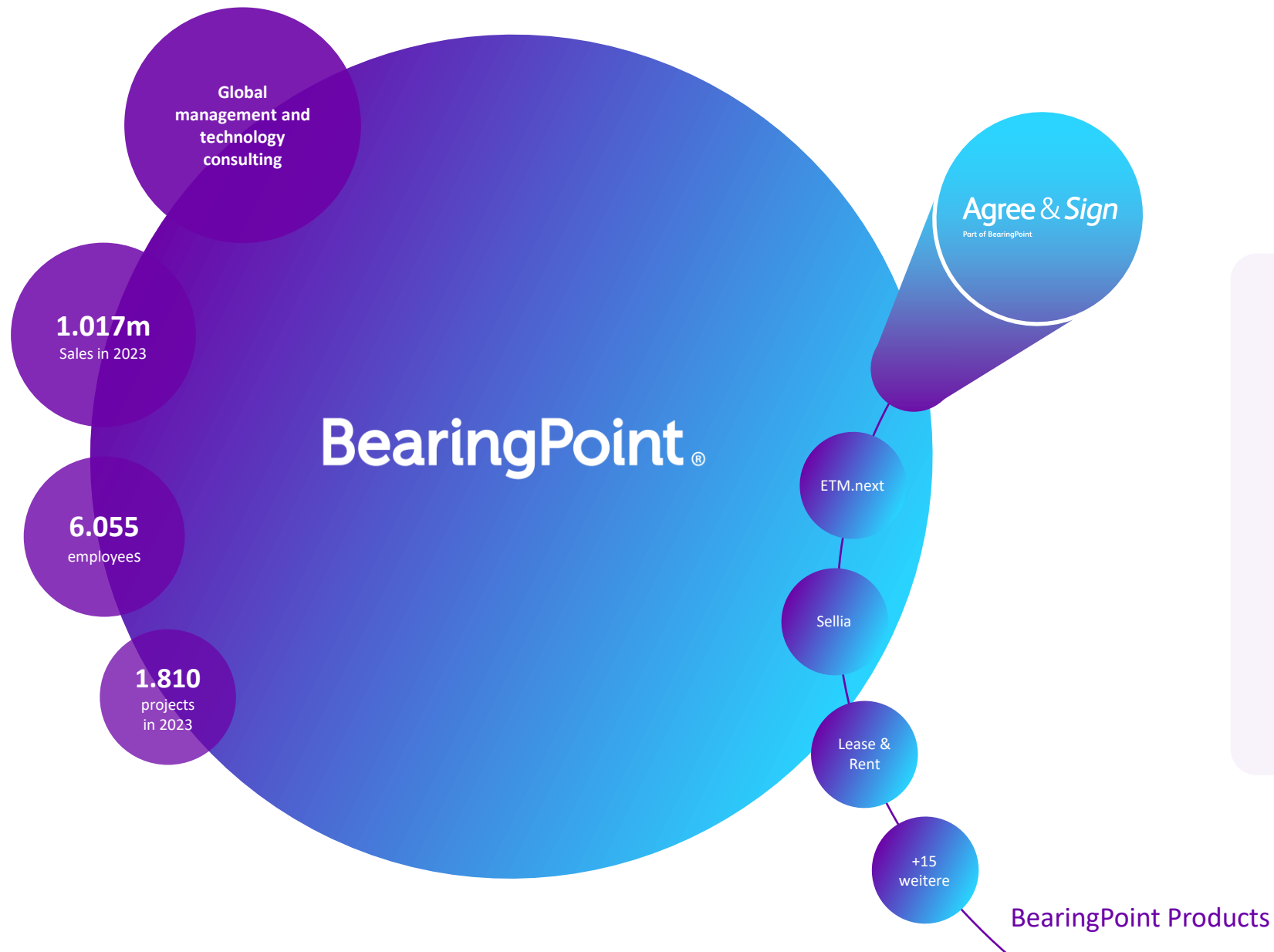
Part of BearingPoint

Created by

**BearingPoint**

**The solution for digital & efficient  
customer and partner interaction**

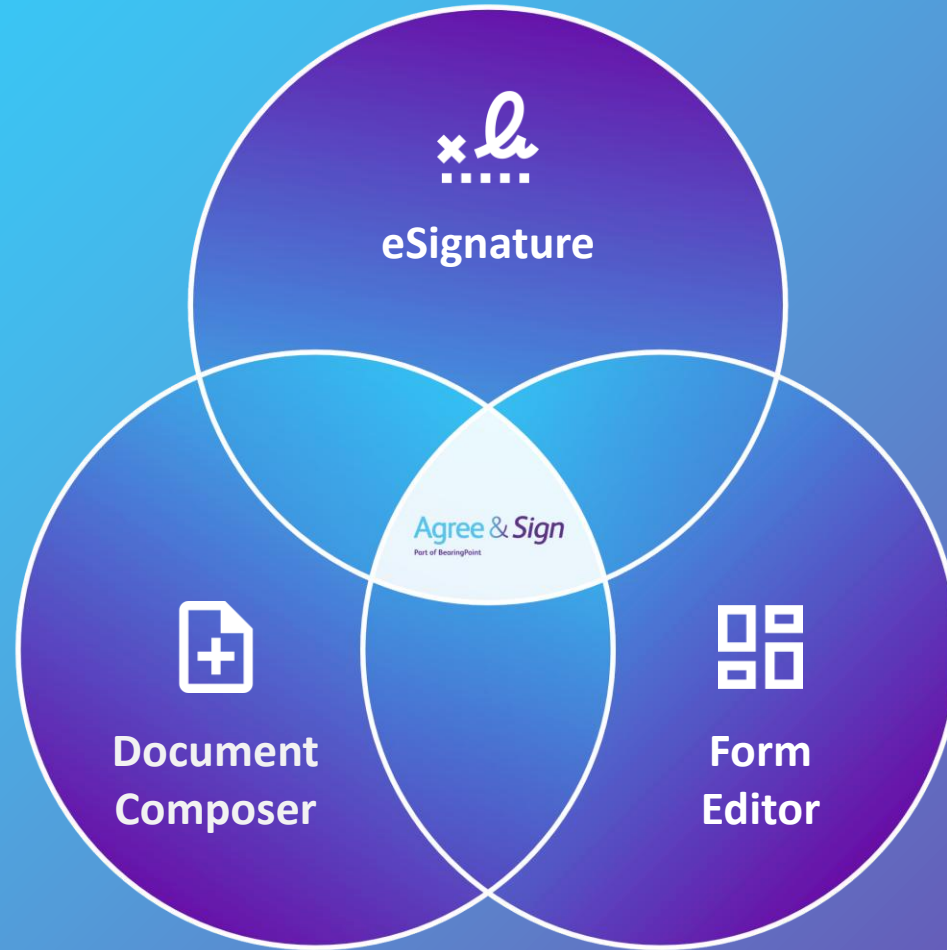
# Agree&Sign: A BearingPoint product



## Agree&Sign as part of the BearingPoint product family

- Subsidiary of BearingPoint
- Benefit from BearingPoint's extensive know-how
- Leverages in-depth industry insights from consultants

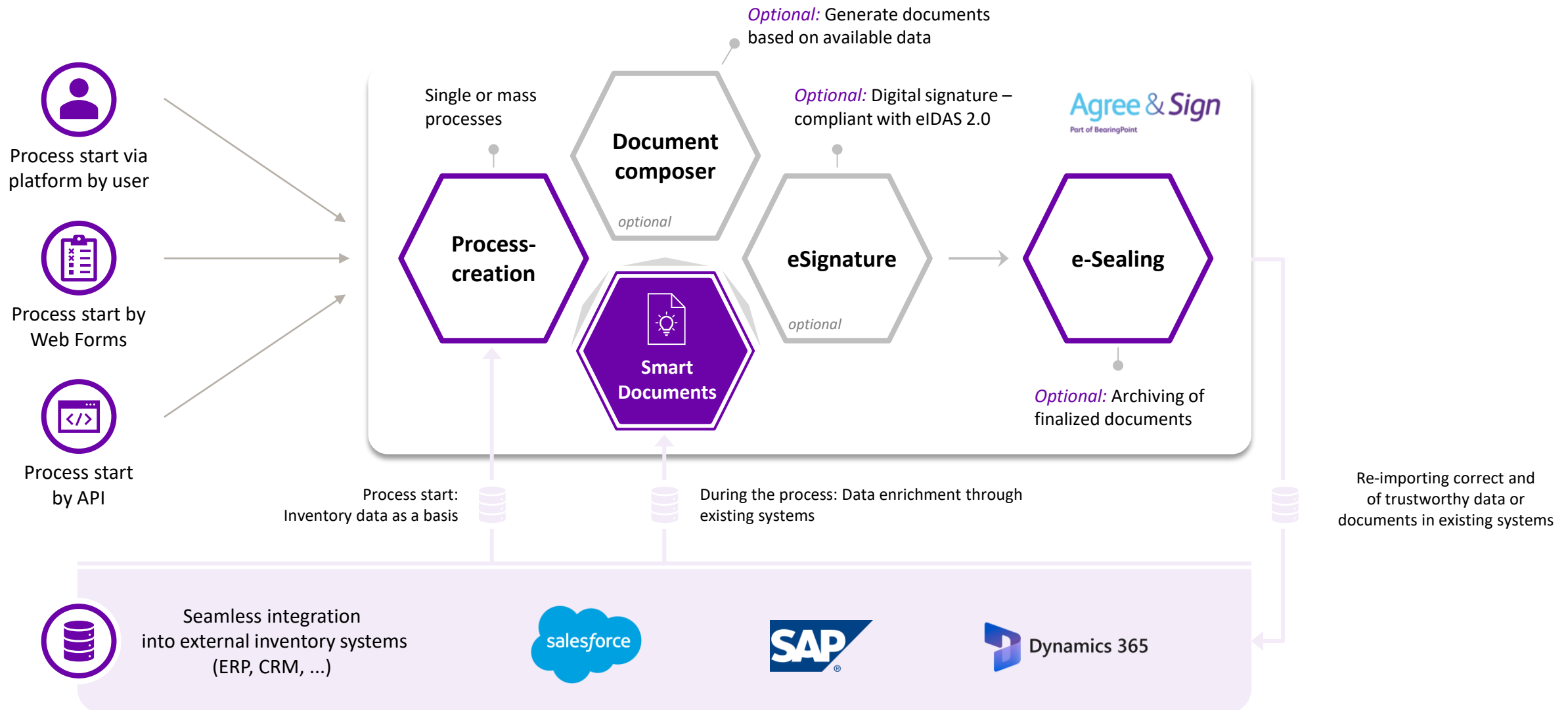
# Smart process digitalization...



... powered by industry expertise

# As a complete solution, Agree&Sign can be used quickly and easily in any system landscape

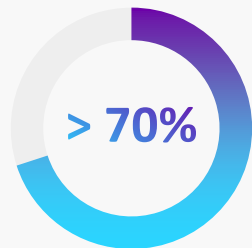
Intelligent documents at the core of modern business processes



# Agree&Sign – More than just e-signatures

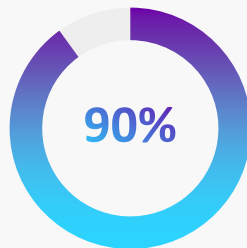
With the Agree&Sign platform, we enable our customers to:

-  **Efficiently** design contract conclusion and data retrieval
-  **Simplify** multi-stage and time-consuming approval processes
-  To hand over data and contract documents in **complete and digitized** form



## Response

**over 70% response-rate** in the first 24 hours



## Less effort

**Up to 90% reduction** in administrative effort

## Typical use cases



Customer/Partner Onboarding ▼



Application Processes & Conclusion of Contracts



Approval & in-house mail processes



Terminations



Inventory Transfer  
e.g. via BiPRO 490 / 430



Obtaining consents/powers of attorney



Amendments to the General Terms and Conditions

... and many more.

# End-to-end digital processes

**Offer your partners & customers a smooth and secure digital experience:**

Agree&Sign makes it easy and convenient for your customers to sign documents digitally. You can access document templates and receive automatic notifications.



## Individual

Set up according to customers' requirements



## Quick setup

Fast go-live with agile expansion stages



## German solution

Complete  
GDPR compliant &  
eIDAS certified



**Import of existing data from CRM/ERP**



**Partners & customers can  
Check relevant data at any time**



**Signing of all necessary contracts by the customer with a digital signature**



**Forwarding and processing of the captured data & the signed document to the target systems**

# High security through encrypted communication



eIDAS compliant  
AES & QES



D-Trust  
Qualified SealID



D-Trust  
Qualified Electronical  
Timestamps

PAdES

PAdES compliant  
PAdES-B-LTA



**eIDAS Certifications** for  
Electronic Signatures, Stamps &  
Time Stamps



All processes are carried  
out in **compliance with**  
**the GDPR**



Agree&Sign is  
deployed on  
**German servers**

## BearingPoint Certificates

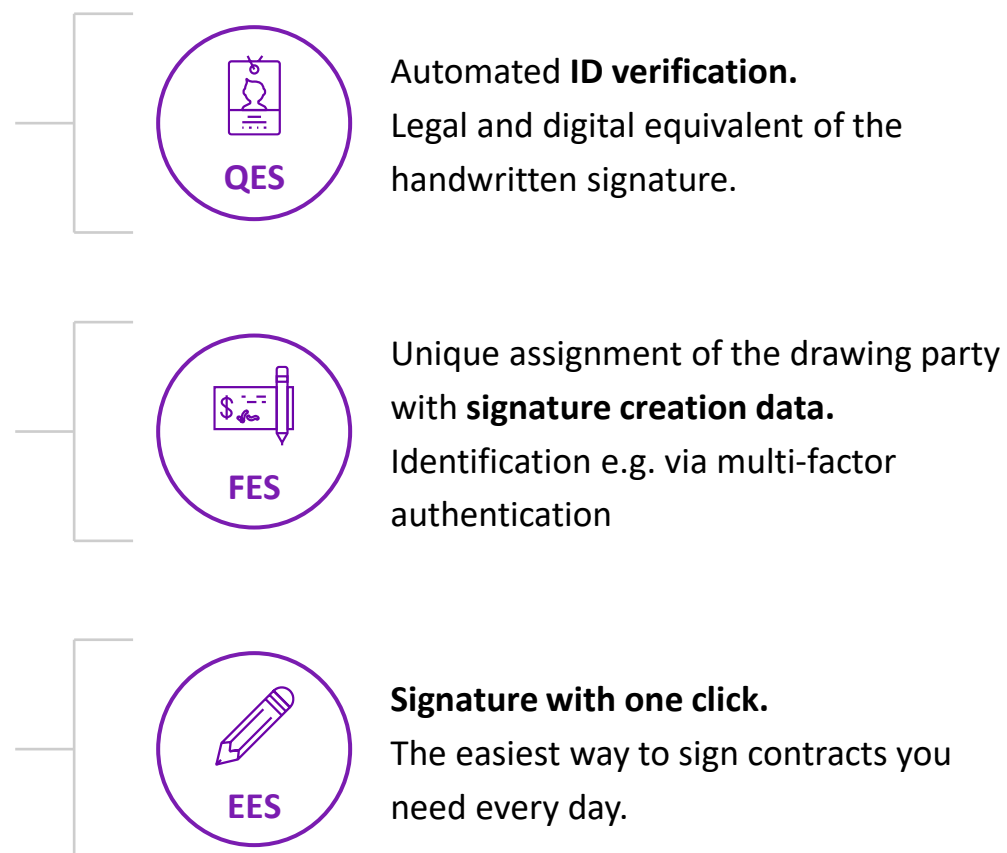
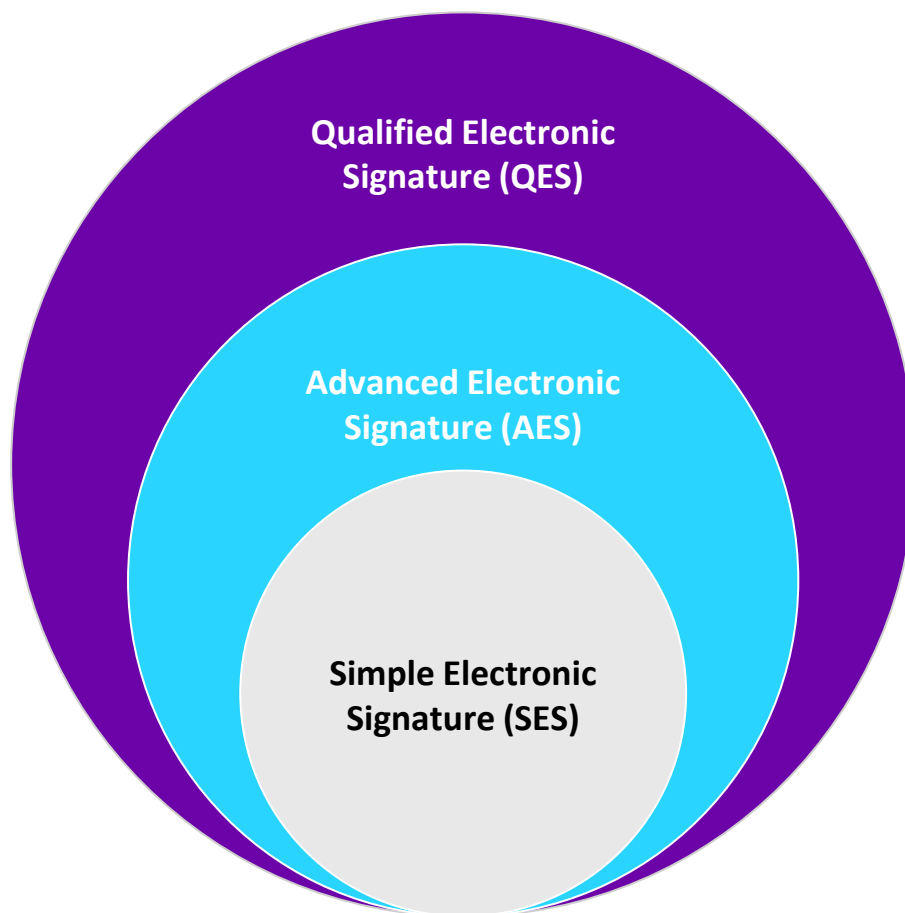


ISO 27001 Information Security  
Management System



ISO 9001 Quality Management  
System

# Agree&Sign offers these signature forms



# Best practice: Reduce maintenance effort through intuitive merchant onboarding processes with Salesforce integration and dynamic contract creation

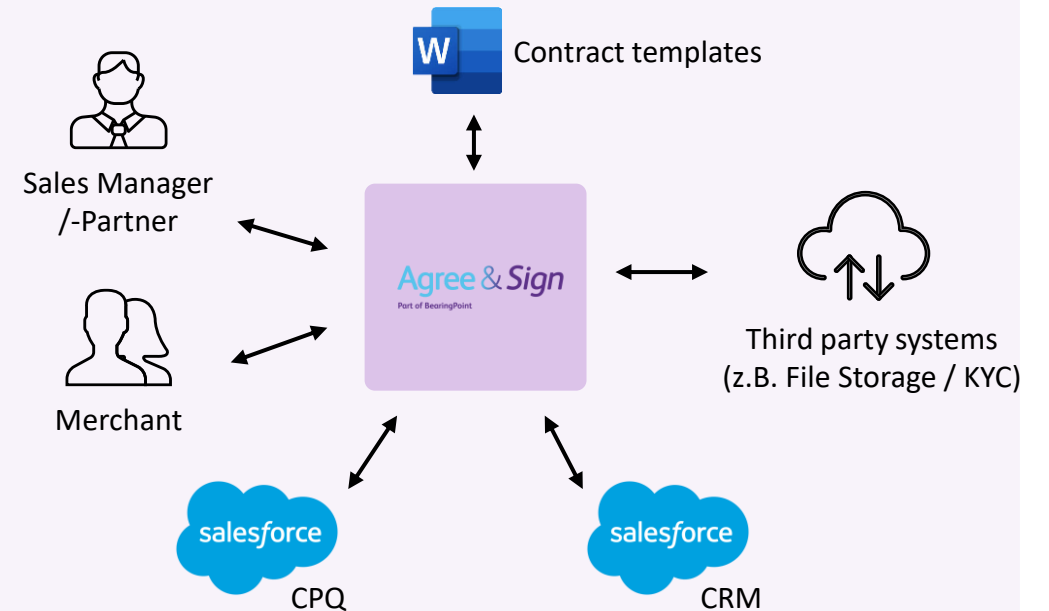
## Initial situation

- Onboarding process for new merchants, which differs depending on the input channel
- Identification through a video identification procedure
- Separate web forms for each route are developed by an external software service provider exclusively for the customer
- Web forms and document templates have to be regularly maintained and adapted, which cannot be done independently by customer employees

## Objective

- Implementation of a seamless and user-friendly digital onboarding process for merchants
- Agree&Sign enables the creation of web forms via drag and drop and independent changes by employees
- Ensure an efficient and flexible onboarding process by integrating with Salesforce and implementing necessary terms and dependencies

## Full integration into the customer environment



# Best practice: With Agree&Sign, HUK\* is provided with a completely digital process for direct and automated communication for intermediary advisors and intermediaries

## Initial situation

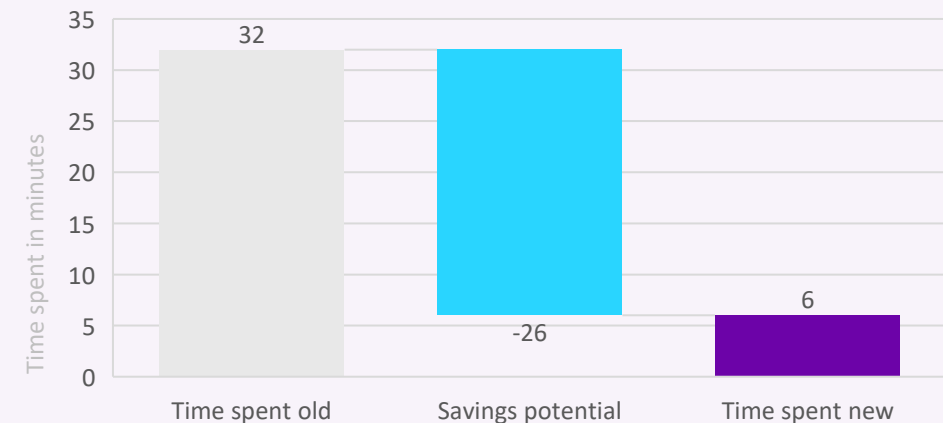
- Approx. 120 intermediary advisors and approx. 600 intermediaries involved in DE
- 1 contract document with 14 attachments
- Annually recurring manual processes
- High administrative effort when creating the user contracts with corresponding data
- High communication effort between company, advisors and intermediaries

## Objective

- The insurance company starts the process once
- Automatic mapping of contract data from the inventory system to the contract template
- Digital verification of intermediary advisors
- Digital verification and signing of intermediaries
- Reduction of response time

## Up to 81% time savings per process

With Agree&Sign, admin activities have been reduced from 32 to 6 minutes per process.



**Savings potential of  
32.5 working days with 600 processes**

# Best practice: Fewer abandonments and significantly improved data quality during partner onboarding through a seamless and integrated process

## Initial situation

- At the insurance company, onboarding processes are carried out in various ways (online or by mail)
- Data is often incomplete
- Until successful onboarding, caregivers have to ask many manual questions
- The insurance company has recently started using a new CRM to improve sales processes

## Objective

- Agree&Sign becomes an integral part of the onboarding process
- Data to be entered via smart web forms, higher data quality
- Smart forms with conditions for higher conversion rates
- Automatic reminder emails
- Successful onboarding with digital signature directly in the process

## Full integration with the existing CRM

Fully digital and **80% faster** partner onboarding process



Partner gets to the onboarding process via homepage or digital invitation



Enter data into intuitive web form



Direct delivery to CRM for maximum data quality and automatic sending of reminder emails



Digital signing of the contract directly on laptop or smartphone



Successful onboarding – complete data in the CRM – automatic storage of the signed contract

# Your contacts at Agree&Sign



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