## Momentum Insurance

The Sales Director at Momentum Insurance needs to get more clients signed up for policies faster. The current process is too slow and they are looking to reduce the amount of deals they lose during the lag time between phone call and signature.

The current process is that Momentum Insurance Sales Representatives are calling potential clients who have expressed interest in finding an insurance policy. The Sales Rep asks the client a series of questions in order to find the client the best policy for their needs, and when the client and the sales rep find the right one, the client needs to sign the policy form application. Currently, the rep has to email the policy application to the client who must;

* Find a printer
* Print off the policy application
* Sign the policy, and
* Scan and email it back.

Once the form is completed by the client, it needs to be routed to an Application Reviewer to review the application and approve or decline accordingly. The appropriate approver is determined by the county in which the client resides, so a processor must determine which Application Reviewer is the appropriate recipient. The processor is currently walking this document to the appropriate Application Reviewer. Once the document has been completed, a copy is scanned and distributed to all parties with the policy information.

Please help the Sales Director find a way to put this workflow into DocuSign, helping them speed up the sale and automate the workflow.