

## EXECUTIVE SUMMARY

**Business Objectives**

- Capture a new customer's hand-scripted signature on an agent's mobile tablet in the field

**The Problem**

- Evaluated 10 e-sign vendors to find the right features, functionality, ease of integration – but most important was finding a true partner

**The Solution**

- OneSpan Sign Enterprise Plan
- Integrated with company's mobile app & Salesforce

**The Results**

- Sales lost due to paper dropped from 50% to 1%
- Saves \$1.2M/year on paper
- Implemented OneSpan Sign ~50% faster than planned
- Rolled out to reps 75% faster in 1 week instead of 4
- Problem-free roll-out
- OneSpan Sign support team "calls us back quickly"
- Fully integrated in both English and Spanish

# LARGEST ENERGY RETAILER IN NA SELECTS ONESPAN FOR MOBILE SALES

Direct Energy is a North American retailer of energy and energy services. A subsidiary of UK-based utility company Centrica, Direct Energy has more than six million customers in the U.S. and Canada, making it the largest energy retailer in North America.

Direct Energy depends on its e-signature capabilities to fulfill door-to-door sales in 13 states plus the District of Columbia. This is Direct Energy's largest B2C sales channel, with 240,000+ new customers onboarded each year.

The ability to gather signatures via its mobile app is vital to Direct Energy's success. Prior to e-signatures, Direct Energy's door-to-door reps had to carry and fill out paper forms; however, half of all paper contracts would get lost or misplaced. Without a contract, the sale is invalid.

"We were losing 50% of sales and spending \$1.2 million a year on paper contracts," says Ken Long, head of technology for consumer sales. "We had to automate this."

Today, the company's field reps use an iPad, mobile app and integrated e-signature capability to keep the customer onboarding process end-to-end digital, all the way through to archiving contracts in Salesforce.

**In a field of 10 potential vendors, OneSpan Sign stood out**

Long and his team looked at 10 different e-signature providers to find one that could meet the energy company's requirements: document encryption, branding opportunities, and the ability to integrate with its critical sales applications. After a period of research, Direct Energy narrowed the field to two providers: OneSpan and HelloSign.

"We did a full feature capability cost comparison across the 10, and the 10 included DocuSign. And although OneSpan Sign was not the cheapest – the less expensive solutions just didn't have near the functionality that we required."



"One of the main factors why I decided to go with OneSpan was their willingness to work with us, the attention we received, and the ability for us to ask questions and get accurate and true responses that showed they understood what we were trying to do."

**Ken Long**

Head of technology for consumer sales  
Direct Energy

## CASE STUDY | DIRECT ENERGY

OneSpan Sign's white-labeling brought a new opportunity to the table. "It was something no one else really provided."

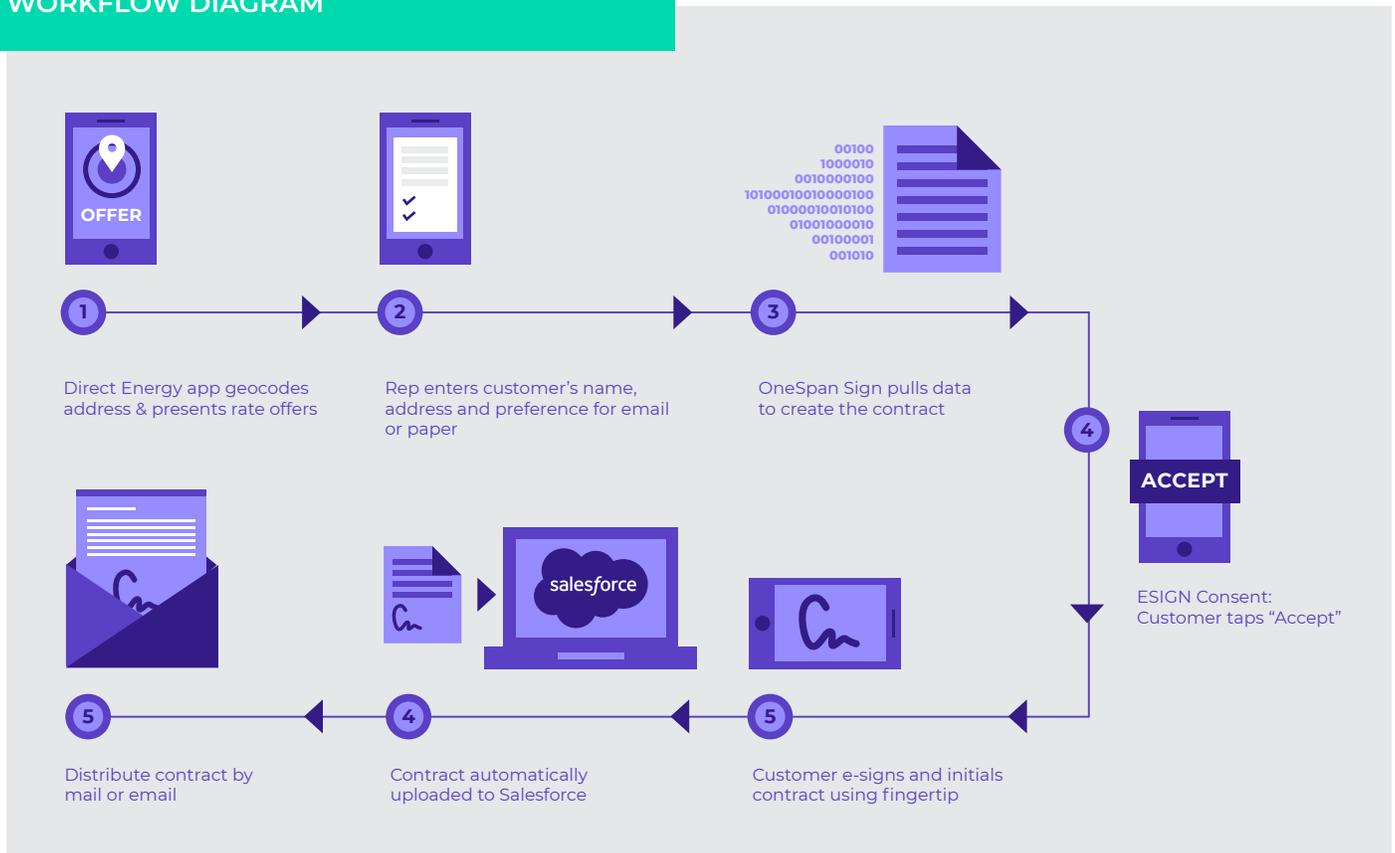
But integrating e-signing and document workflow capabilities directly into Direct Energy's mobile app trumped all other considerations. "We have an iOS app that the agents use for their sales journey. So that was the most critical for us."

### Result: OneSpan Sign implemented in almost half the expected time

After a six-week proof-of-concept testing period, OneSpan Sign won Direct Energy's contract. "We built in a 90-day window for the integration and go-live," says Long. "We got full implementation in 48 days, exceeding my expectations."

The roll-out to reps was even faster. "We originally planned to roll-out the OneSpan Sign integration to our 350 field reps gradually over a four-week period. We ended up doing it in one week. We didn't experience a single problem. I anticipated an influx of calls. Not a one. No bugs, no latencies, no problems."

## WORKFLOW DIAGRAM



## CASE STUDY | DIRECT ENERGY

### Life as a OneSpan Customer

"We're very satisfied with OneSpan support," Long adds. "If we can't get them on the phone when we call, they call us back quickly."

"We have not had any outages – we're at 100% so far, which is great. And the response from the tech team and dev team has always been good."

Most importantly, the people on the ground, the sales reps responsible for meeting Direct Energy's ambitious sales targets, have been very pleased. "There were definitely some immediate positives that we got," Long says. "I didn't hear any negatives, and they just felt that the signature process was simpler and cleaner, and easier for them and the customer."



"We're very satisfied with OneSpan support. If we can't get them on the phone when we call, they call us back quickly. And the response from the tech team and dev team has always been good."



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