How Dave Silver Insurance Simplifies Medicare Insurance Form Signing



Introduction

Dave Silver founded his own health insurance company 17 years ago in Bradenton, Florida. Dave Silver Insurance specializes in Medicare plans, guiding retirees in Florida and beyond through the often-confusing world of government healthcare insurance options to find the best plan for their situation.

Challenges

Government programs require a lot of paperwork and regulatory compliance. Working with a clientele of senior citizens means that the technology that makes most business easier often makes Dave's business more difficult. For a long time, Dave either mailed forms to his clients through the post or emailed them and then walked the client through printing or digitally signing the form over the phone. This was a time-consuming and "extremely challenging" process.

"If we don't get this documentation back, then we can't fulfill the sales process, which is, in essence, how we earn a living," said Dave. He decided to see if there was a solution out there that would neither confound his elderly clients nor break the bank.

Solution

Dave decided to try out BoldSign® because it was an inexpensive option, and he was very pleased to discover how user-friendly it is.

"BoldSign really was able to streamline the whole entire process," he said. "It seemed to do what a lot of its competitors did at a fraction of the cost."

Dave signed up for BoldSign. "So, I'm like, let me give it a try and see how it works. And it works fantastic! It's a great service."

Industry
Medicare health insurance

Product used
BoldSign®

Region
United States

Use case
BoldSign has helped eliminate friction in remote signing, making it easier for both clients and staff to complete important documents quickly and securely.

Result

Dave Silver Insurance has now used BoldSign to collect thousands of signatures. The platform makes meeting the company's government compliance requirements easy, time stamping every document. The signature collecting process is now seamless and contributes to the company's professionalism.

"The ease with which our customers were able to sign these documents, it makes our life a whole lot easier," Dave said. "I would say 99% of the time people are able to do it [without help]."

Conclusion

With BoldSign, Dave Silver Insurance found a cost-effective way to streamline its signature-collection process. BoldSign is user-friendly and simple, letting even clients who are uncomfortable with technology use it with ease. It also provides all the features Dave needs to keep his documents ready for government requirements and audits.

"I highly recommend other businesses that need to get documents signed remotely to utilize the service," he said. "From a compliance standpoint and from an efficiency standpoint, it's been a remarkable business tool. Absolutely, 100%."

If you're looking for a way to digitize your signing process without going over budget, check out BoldSign. Sign up for a **free trial** or **request a free demo** to ask our experts how BoldSign could fit your particular situation.