

A Property Manager's Guide to Forms Live

Marc: Well, morning, everyone. Welcome to today's webinar. I'm Marc Persico, I'm the content creator here at Forms Live, and I'm joined by Ben Slawitschka, my fellow Form Guru, and Business Development Manager. But I'm also joined by a very special guest today and that's Nina Sutton from Property Management Partners, which is super exciting. Everyone, before we jump in today, I just want to say if you have any questions throughout the session, please use the chat or the Q&A feature, we'll answer them as soon as possible - and we'll even leave time for you to ask those questions at the end - so, today's webinar is a Property Manager's Guide to Forms Live, we'll be taking you through the basics of the platform, and we'll also be sharing a few tools that we think property managers will benefit from with the help of our property management pro...speaking of which, Nina, would you mind talking about Property Management Partners for those who might not be familiar?

Nina: Hi guys, and thanks for having me today! Always good at doing things with Forms Live. So, my name is Nina and I'm the Director at Property Management Partners. So, those that don't know me, we are pretty much a consultancy business for the property management space. So, we manage rent rolls on behalf of our clients, we also provide training and events in the property management space. If you haven't been to one of our events, you should definitely get along - they're always a lot of fun - But yeah, we're basically just here to help the property management industry any way we can and we work with some really great people, like Forms Live, to bring these great solutions to you and your business.

Marc: Perfect. I think a good place to start, Nina, would be...what are some of the key features and functionalities that Victorian property managers look for in PropTech?

Nina: I think the biggest things that I've found when I've been out consulting is we're all looking for a really great integration partner, and something that will streamline their processes and make their life easier, save them time - I think we're all very time poor in the property management industry.

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So, anything that can save us a little bit of time, definitely is what they're looking for in that proptech space, and like I mentioned, seamless integration with some of those property management software.

Marc: Right, and Ben, with all that in mind, can you take us through the basics of Forms Live and touch on some of the benefits for those who might be new to the platform?

Ben: Sure. So, Forms Live is, obviously, a digital form solution for the real estate industry here in Victoria. We host compliance sales and property management and commercial forms. We integrate with a lot of the CRMs that you guys would be using, a lot of that data will flow through. Taking it a bit further, we have eSigning, which is built in which I suppose we all got used to doing COVID and lockdowns, where you don't physically have to be in front of someone to get a form signed. And we actually have a national product as well, so we have helped about eight and a half thousand offices around the country in cutting their admin time by about 78% compared to the old conventional way of pen and paper.

Marc: Yeah, fantastic, Ben, and, you know, you mentioned compliance, of course, can we maybe elaborate on the importance of compliance in terms of property management?

Ben: Our forms are made in consultation with our property lawyers, Colin, Biggers and Paisley, who are based here in Melbourne and Sydney. So, if there's any legislation changes, we'll be consulting with them well in advance, and our development team will make changes were needed, and have those ready by the due date and ready to go. If there's any small changes that are required throughout different periods of time, you will notice, for example, if you ever go in and create a form and you haven't completed it, then leave it as a draft, save for next Friday, and a new update that comes out on Monday, the form will actually say this form has been updated due to recent legislation changes.

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Unlike carrying around an old notepad that you might have had bought two years ago from somewhere and there's been changes, you won't get caught out with that. When you do create a form on Forms Live, it is the latest version required by law.

Marc: Awesome, and I guess, Nina, that takes us to what are the common mistakes that property managers are making today in terms of compliance and just- everything else?

Nina: Yeah, that's one of the things actually I was going to touch on, quite often when we go into offices and, you know, do consulting and those sorts of things and check their paperwork, a lot of their forms and things like that are outdated. So, you know, that's what I love about Forms Live is it's constantly updating. So, any legislation changes anything that changes within, you know, Consumer Affairs, those Compliance Statements, all of those things are constantly updated because yeah, I see that a lot. I go in and Leases are out of date, Managing Authorities or Owner Instructions. It's a real serious problem, especially if we haven't been updating them on a regular basis. So, that's definitely something that that I see quite often.

Marc: Yeah. And Ben, since you kind of answered my next question there, maybe we could also discuss some of the property management forms that we have available on Forms Live - and Nina might be able to provide some insight on their usefulness in a real-world context.

Ben: We've obviously got your Residential Rental Agreements, your Authorities, Mandatory Disclosure Statements, now, these are all available with eSigning, but on the screen that you can see here, off to the right with those Info Request tabs - so, a good one would be your Rental Provider Instructions -some agencies will like to take a rental provider through that with them, some will want the actual rental providers to do that on their own, but with Info Request, you can actually send it off to them, they fill it in and send it back - so you're not having to do it for them, and it's all electronic, as I just mentioned as well.

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Nina: Yeah, and I think the biggest thing for me that I see is the amount of time that it comes back, you know, the return rate is huge. And I think compared to, you know, always for us as PMs, having to chase the rental provider to come in and sign the forms, or, I know back when I was working in the office, like trying to organised the tenant to come in to sign the lease, all those kinds of things going electronic is, you know, the way of the future- well it's now actually, it's not really the future. I think if you're not on some sort of electronic platform, now's definitely the time to make that switch. It will save you a lot of time.

Marc: Yep, and I will just say, you know, we love client feedback. If there are any forms that you guys want to see on Forms Live, do get in contact with us! And just because we touched on Info Request there, are there any other management tools and features that we offer that we might be able to talk about?

Ben: So, other than integrating with CRMs, we do integrate with most of the Utility Connection companies as well, which we're going to take you through. So, it's as simple as hitting the connection button, which is off to the left-hand side there - and selecting which Utility Connection you're after, just as Marc has done there. And then you'll see that you've actually got your account connected now, back through Forms Live. And just as I've mentioned, as you can see, Marc is on an internet browser, so Forms Live is completely web-based, I probably should have covered that earlier. You don't need to be on a Windows machine or Apple machine, it'll work as long as you've got access to a browser and internet, you can access it anywhere you are.

Marc: Yeah, and I'll just say, this is the offer page so that once the client has signed the form, they will immediately, and automatically be shown this page, offering them assistance with the move, and they can accept it. They will confirm all their details, and yes, pretty simple, hey?

Nina: Yeah, and this is exactly what people want everything all-in-one. So, they don't have to go into multiple different programs, to do all the things that are required - especially moving in or vacating, those sorts of things.

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Ben: Exactly, I think the other feature that we're going to cover, Marc, was our Commercial Reports. So, we partnered with Equifax, this is probably more directed to commercial properties where you might want to do a company search or a credit check and so on. So, there is access to purchase reports through Forms Live via Equifax as you can see here, so if you wanted to make sure that they are all trading and everything was all okay, before you put them into a certain property, you can also do that.

Nina: And you can do NTD Checks for Residential Tenancies, is that right?

Ben: Yeah!

Marc: Let me pull up an example of one now actually - this is what that will look like.

Nina: Yes, this is really good for the NTD Checks as well, so I think when we're touching a lot more on compliance now, in today's world of property management, a lot more people are starting to do these background checks to make sure that they're not blacklisted from another property. So, I guess it all works on making sure that we're putting people on that list if they're not paying their rent and those sorts of things as well.

Marc: And those are just a few of the tools that we have that help out property managers specifically. You know, we have a lot more that can help you sign forms faster and fill out forms a lot more efficiently. So, if you have a certain problem that you're trying to solve or a process that you're trying to improve, then, chuck that in the chat or even contact Ben after today's session. And we'd love to take you through it. Yeah, I guess you kind of touched on it there, Nina, but how do you think these tools will benefit managers in their day-to-day work?

Nina: Yeah, I think the biggest thing is that, again, it's that time saving - not having to jump into different areas to connect everything all at once - being able to do it in that one program and with that seamless integration with the CRM is- yeah, I think that's a game changer.

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Marc: That's great, and, you know, we here at Forms Live are huge supporters of the 'paperless office' so as we've been touching on throughout all of today's session, maybe we can discuss the benefits of going paperless in an industry that's evolving so fast thanks to proptech.

Nina: Yeah, look, I think, I don't know if it's 'going paperless' I think everyone should 'be paperless' - if COVID kind of taught us anything, those that were paperless found the process a lot easier during those lockdowns here in Victoria - I just think, you know, we're moving into a generation of tenants, or renters, as they're called now, and landlords that really are a lot more tech savvy, and they are time poor. So, I think they want that electronic connection, so I think if you can go paperless- and not only that, who wants to have all of the files and papers in their office anymore, having to make sure that it's all in a folder, and storage, and all of those kinds of things. And what's really great is the forms, you can save them within your property management software, whether that's PropertyMe or PropertyTree, whatever it is you're using, and very easy then for anyone to be able to jump in and locate those forms without having to be in the office to find all of the paperwork, so to speak.

Ben: Yeah, I think that's probably my biggest thing. It's very hard to lose a digital form. In my life with everything, even trying to find a receipt after you've purchased something- it's like, where did I put that thing? So, yeah, with digital stuff, you won't have that worry at all.

Nina: I think more and more, you know- well less and less, I should say, we've seen people that that aren't paperless, as we're going into offices, it's becoming less and less, which is great to see.

Marc: Fantastic. Well, thank you, Nina and Ben, I think that was a pretty good rundown of Forms Live and its benefits to managers across Victoria. Now, I guess we'll leave time for some questions. If you have any, please flick them in the chat or use the Q&A feature. And yeah, we'll answer them as best as we can. I think I did see a comment earlier saying, "who hasn't heard of Nina Sutton?"

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Ben: He's correct!

Thanks, Joe - hopefully, we're going to see you at Halloween, Joseph. I haven't seen your name on the list yet!

I think Marc's going to put my details up, anyways. So, if you'd like to have a more in-depth demo, more than happy to do so. And once we complete that, I could get you set up with a trial account for two weeks, so, you can test it out. It's not a basic label, it's the full suite of the product. So, you can connect it with your CRM, and so on, to see if it's actually going to suit your business - and, happy to answer any questions during that process as well.

Nina: Yeah, and if you want any feedback, or you want to just run it past me, feel free to reach out to me on socials, just Nina Sutton, very easy to find. I'm more than happy to give you some feedback that we get from our other clients as well.

Marc: I think we have a question here...

Question:

In Commercial Leases, there's a section where it says bank guarantee, we need this to state security deposit - can we have this changed?

Ben: Yeah, I'll take note of that, Sarah and reach out to you, that shouldn't be a major change - and I'll just have a chat to the dev team. We have a meeting tomorrow morning, so it's probably perfect time for it! Thank you, Lindsay - glad to see that you're using it and love it.

Nina: I know Lindsey! Hi, Lindsey!

Marc: One more thing from Sarah...

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Question:

If we have created templates do these also update when changes have come in for forms?

Ben: Yeah, absolutely!

Marc: Awesome. As Ben said we do like to keep this short. So, if anyone does have any questions, absolutely contact Ben or Nina after the session. I'll also mention we have a special deal available to new subscribers who are also with Property Management Partners - so yeah, bring that up to either one of them and they can help you out with that - if you need any assistance with the tools mentioned today, our Learning Centre would be a great place to start. You'll find that from our website under Learn, and you'll also be emailed a recording of today's session as soon as we have it available. Thank you, everyone for joining us today - and thank you so much to Nina for chatting with us.

Nina: Thanks for having me.

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