

Signing Simplified with Forms Live & DocuSign

Marc: Hi. Welcome to the webinar everyone. I'm Marc Persico, I'm a content creator from Forms Live, and I'm joined by Jenna Beum, an account manager from DocuSign. Thank you for joining us today, Jenna.

Jenna: No problem, Marc. It's great to be a part of this webinar.

Marc: Today we're gonna be talking about how you can sign forms twice as fast in half the time with DocuSign and Forms live. The DocuSign integration in Forms Live is something we always get really excited to talk about. It has just helped us completely streamline the signing process, and we've seen usage of DocuSign double year on year since the forms I was launched in Victoria, which, you know, it's great to see agents doing so much more in far less time isn't it Jenna?




Jenna: It's fantastic. And you know, the turnaround time that we've seen through our integration with Forms Live has really transformed real estate.

Marc: Yeah, it's great and that's a good point to start on because I think the starting process, one of the biggest benefits we've seen our users reaping from it would be just a significant reduction in turnaround time. Could you take us through the steps DocuSign erases from the traditional signature process, Jenna?




Jenna: Yeah, absolutely Marc. So as I mentioned, it's really transformed all industries, more specifically, real estate. Traditionally, as everyone could probably imagine, you'd be, you know, printing, scanning, faxing, posting. This day and age I spoke to a customer the other day, it was about \$16 to post an envelope to somebody. And then not only that waiting, you know, whether it be a week, two weeks, sometimes over a month to get it returned -and then not only that, you keep it or store it in a file where you could potentially forget where the file was placed. You know, it'd be rearranged, with other documentations. So you can already understand the number of steps in that manual process - and what DocuSign really serves to do now moving forward is ensure that there's one stop for everything. What we really want to just ensure is that you're simply uploading that form, creating templates where it's stored consistently within the DocuSign portal and sending it.

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It's really quick in regards to getting any returned document, with the signature or details from your clients or, or customers - and then having that central repository where it's stored and you can't lose it. You're always keeping tabs on those important contracts and agreements that you need to keep forever.

Marc: I'm glad you brought that up about the one stop shop kind of thing. I think Forms Live, that's a big thing for us. We're trying to have all the forms and all the signature process in one place. And we've definitely seen a big improvement on turnaround time. Agreements are being signed within 12 hours on average, and sales contracts signed within six hours. And those are just averages, realistically, these forms can be signed within mere minutes, which we've also seen happen a lot. So, do you have any statistics on how fast users are signing with DocuSign compared to the traditional process?

Jenna: Yeah, absolutely. Look, it's been mind blowing in regards to how quickly all of our customers are getting their agreements returned. So fun fact is based on statistics, we have found out that 50% of all agreements signed are returned within 15 minutes. So that is pretty phenomenal, right?

Marc: Yeah, that's crazy. I mean we're in an age where phones and laptops and smart tablets play such large roles in our lives and our work. So do you think the remote nature of technology today has a large role in the reduced turnaround time that DocuSign provides?




Jenna: Absolutely Marc. You know, everybody that we know has an iPhone or a Samsung or an iPad or a laptop, and they're always on the go. You know, a lot of people now especially are post covid or remote working or not in that one sort of office space. There's a lot going on and so, it's definitely transformed the way that people work. We've even got a feature where we can send DocuSign through an SMS, known as SMS Delivery. Especially because of this remote nature where we know that people aren't just gonna be sitting at their computers all day and stationary in one spot. They are on the go, so this SMS function specifically promotes that sort of remote way of living as.



Marc: Yeah, we introduced mobile view forms live last year and it's been so great because, you know, an agent or manager doesn't have to be behind a desk in an office to send those signature requests.

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They can be at home or even, you know, jumping between open houses and all that. And it's been, it's been really great. So I think another good thing to talk about with integration is how it can help users mitigate the risk of human error. You know, we're in a world of real estate forms, small mistakes can lead to very big problems, so it's very important that the risks associated with human error are avoided as much as possible. But it's inevitable, you know, we're only human, we make mistakes. It's just that those mistakes can leave bad impressions or worst case scenarios, they could just not receive a form at all. So Jenna, could you touch on the edit and resend function and how it could be valuable to our viewers?




Jenna: Yeah, absolutely. So it's a really good point that you raised, Marc, in regards to that function being very applicable. I mean, how many times do we all make mistakes each and every day, whether it be a specific letter in a document, or just the wrong details entered in? We are all busy, it's human. So what we refer to this as, as the Correct Function. Ultimately any traditional document that you would print out, you make a mistake, you have to throw out paper. It's not very environmentally friendly either. You are, you know, wasting paper, but moving forward, what we can actually do is correct these documents. So as soon as you're making a mistake and you're sending it out, you've sent it out for signature - before you even get the signature, you can edit that and correct it and just simply change. Mistakes or errors within a number of seconds and send it back to the customer. So it's really instantaneous. It's quick and it's sustainable.

Marc: Yeah. I might just share my screen real quick because Sure. Okay, so the process within Forms Live is actually super simple. Each form has this optimised sidebar here, and if you go to the signing tab, you'll see I've sent, sent the form for signatures, but I've spelled the name wrong in both the name and the email. So you can simply go in and correct both of those and resend just like. And then they'll receive the signature request, like instantly. It's such a quick process compared to, like you said, you know, throwing it out, sending it again, and all that, you know, considering how damning these errors can be when sending hard copy documents. Do you have an estimate on how fast and much time is saved with the edit and resend feature?




Jenna: Yeah, look, it is within a number of seconds that you can make these changes and think about it, as we mentioned, that manual process can take hours.

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You know, I speak to customers every day in different industries where, you know, they have to spend a lot of time on admin. Correcting these errors where they could be more productive and selling properties, speaking to tenants and so forth. So yeah, it saves hours, I would say a day in regards to just having this efficiency and what Forms Live can do. From what you've just demoed Marc, is superb in regards to saving that time.

Marc: Yeah. I mean it's lucky. It is pretty worth reaffirming that this is all done within Forms Live. So you want, you know, jumping between tab to tab to complete a task as simple as this. This leads me to another point about one of my favourite ways that DocuSigned Forms lab work together, which is attachment signing. Once a PDF has been uploaded to Forms Live, you can actually go in and edit fields onto the PDF.




So going to the edit fields tab and clicking signature, you can just place them and then drag and drop everything into the right position. And the great thing about this is, When you send the initial form to be signed with DocuSign, the recipient will also be prompted to sign the PDF and the fields that you place as well, which is such a simple process. And it's so great because, you know, how many times have you wanted to receive acknowledgement on attached section 32s and Renters Handbooks, and now you can actually do it, which I think is awesome and not too different from the DocuSign process, I believe.

Jenna: Correct. Exactly. It's just a really good guide for all of your clients to be able to really follow and ensure that they understand where they need to be placing their name or their address or even their signature and initials without forgetting, because I'm sure everybody's experienced a return document or agreement come back without a specific detail and then you have to restart that process. Yeah, it's a really good way just to prompt and ensure that individuals are aware.




Marc: Now I do want to take some time to talk about what's next for this integration. You know, we're always improving Forms Live and, and adding things with the goal of making life easier for subscribers, and that's something that DocuSign has helped us to pursue. In that vein, I will share that we're looking to release DocuSign identity for ID verification very soon on the platform, which is super exciting. Jenna, could you just expand on that IDV tool for me?

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Jenna: Yeah, absolutely. So, DocuSign has partnered with Australian Post, which is really exciting and really superb in terms of ultimate updates. Ultimately ID verification allows you to verify the individual that is signing your document. And what it will do is allow you a hundred point ID check where you can place your details of your Passport, your Medicare card, your Driver's License, and any other document that you wish that's in the list. And therefore it will verify against an Australian data pay database, where it will then be able to verify that the signer is who they say they are before they even open an agreement, which is really great, especially in today's times where security is becoming. Tightened and some regulations have been put in place as well.

Marc: Yeah, I was just about to say, best practice security methods are very relevant at the moment and very important, so I'm sure it's been received very well on your end.

Jenna: Absolutely, absolutely. And you know, it's really becoming extremely predominant across all of my real estate customers or all of our real estate customers - including other industries as well. So, I'm sure you can imagine what's happened with Optus recently as well. Yeah. Um, these things are quite necessary.




Marc: Yeah, absolutely. Okay, Jenna, I think it's about time we wrap it up. I just wanna say thank you so much for joining me today. It's been really great speaking with you. I mean, yeah, this integration is just so good to talk about and having your input from a DocuSign perspective is perfect. Thank you.

Jenna: Thanks so much, Marc. It's been a pleasure to work with Dynamic Methods and I love this integration with Forms Live. So thank you so much for having me today.




Marc: And if anyone has any questions about Forms Live and its integrations, then I'll point you towards Ben, our Business Development Manager. I'll put his details on the screen. Thanks everyone.

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