Keeping up with Demand

Marc: Good morning, everyone. Welcome to Forms Live's latest webinar. If you haven't attended before, I'm Marc Persico, I am the content creator here at Forms Live and today I'm joined by two of our form gurus - we have Chelsea Dwyer and Ben Slawitschka - they are also our Business Development Managers. For starters, if you do have any questions throughout the session, please use the chat or the Q&A feature and we will answer them as soon as possible, we'll also leave time at the end of the session to answer any questions as well. So, you've signed up for today's session, because you want to know how Forms Live helps agents and managers keep up with the demand.

Right? Well, now that offices are back in full swing, we figured this is the perfect time for us to talk about the tools that help our agents keep their productivity at an all-time high, even when they're out of the office and in the field, especially then. So, let's get into it, Ben and Chelsea, if I were an agent, or a manager and I was out in the field, I'd want to be as productive as possible wherever I go. So how does Forms Live accommodate for that?

Chelsea: Good question, Marc. It's really an issue that a lot of our subscriber's encounter, maintaining that productivity outside the office. I mean, this is especially true for those who often find themselves on the road working out in the field and visiting properties, even agents who operate far off in the country as well and might have to travel quite some distance. So, let's face it, who wants to lose hours to travel time, right? It'll be such a waste and that to do list doesn't get any shorter. Some of our viewers might not know this, but you can actually take Forms Live with you out in the field in a couple of ways.

So, the platform actually has a smart tablet capability, meaning wherever you and your tablet go, your forms and tools go as well. Create forms and fill out their fields with your clients right in front of you and then you can have them sign in-person with our sign on-screen feature. Or if you have the time, complete the form required before you leave the office, so you can have it ready to go for on-screen signing when you're with your clients. It's great for productivity and it's really as simple as accessing the platform from your tablet's browser. So, no app downloads are necessary. However, you can have quick access to Forms Live by saving it to your home screen. If you have an Apple device, it's as simple as tapping 'Share', then clicking 'Add to Home screen' and giving it a name before clicking 'Add'

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when you're done. Just know this may be different on each respective tablet and browser. So, Google it if you don't know!

Ben: Yeah, I'd absolutely recommend giving our tablet capabilities a try on any tablet that you might have a preference to. I'd also like to add that you're able to view the status of forms and send forms for remote signing from your phones within Forms Live through our mobile view that Marc is showing there. Admittedly, it doesn't offer as much capabilities as a smart tablet would however, it's handy tool if you're on the road and needing to follow up with clients on a form's signature status.

Marc: Fantastic. Yeah, I know that's a go to method for our agents and managers who spend a lot of time out in the field and, you know, speaking of being on the move, it's not always possible for agents and managers to catch up with clients and even contact them over the phone, maybe due to the agent's busyness or even the client's. So, would it be possible for a client to fill out a form's details directly on behalf of the agent or manager?

Ben: Well like you said, Marc, it's not always possible and waiting around is exactly the opposite of what we're trying to portray here today with 'keeping up with demand' which, of course, is productivity and efficiency. Say for instance, if you're in dire straits of some client information like an address, or even a hard name to spell and the client isn't answering phone calls or emails, or maybe they're unable to meet with you, I know personally how frustrating it can be, you can actually use a feature called Info Request.

So, this feature will enable you to send draft versions of your forms directly to clients and from there they'll be able to interact with the form as you do, filling in the required information that you're after, and then sending them back to you for your confirmation. So, I think we're going to give our viewers a little demo of this aren't we, Marc? So, within the form, we find the Info Request tab, where you fill out the contact details, which Marc is doing here, you can leave a message if you'd like to and recipients will be emailed the request from there and gain access to the form - they'll be able to interact and complete the fields that you're after and then sent back to you for confirmation as mentioned earlier.

Marc: Quick example here...and yep, this is just what the client will be able to see, and they'll be able to complete the fields highlighted here.

Chelsea: We've had such great feedback from this feature. I'm just going to add for everyone, not every form we offer has Info Request. So, it is a growing list of forms, but if you have a look on the right hand-side, once you've logged in, you can see which forms are Info Request-friendly, they're the ones with the little blue Info Request label and has that little feature accessible to that particular form. So, there you go, the little ones in the blue!

Marc: Yeah, Info Request is great. We have a lot of resources around that feature as well and if you'd like to learn more about that after the session, then I'll point you towards our Learning Centre. Okay, so what about those in the audience who want to have their work done and their checklist checked before they move on to different jobs? Let's talk about form management and form completion. How can our viewers speed up and simplify their workflows?

Chelsea: I for one can absolutely understand wanting to have one task done and dusted before moving on to a different one, as well as having things checked off my to-do list well in advance. Luckily for everyone tuning in today, speeding up and simplifying form workflows is pretty much what we've been striving for, since the very idea of Forms Live was conceived. That's exactly why we've introduced features such as Templates.

So, Templates allow users to generate forms that they are often using for more than one transaction. Once prepared and saved, the templates contain prefilled data and can then be used to create forms with all that pre-saved data populated and waiting in the new form immediately.

Ben: So, everyone apart from the field data, you can add Annexures and even external documents as attachments, as PDFs as long as they're saved as a PDF format. They'll be saved within the template and generated alongside future forms. So, I think we've got a video of that that we're going to show as well...

Video link

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Ben: As you can see, it's easy it's as simple as clicking on the three dots beside the relevant template and then selecting create form - forms are populated with completed fields as well as the exact annexures and attachments that you've saved previously.

Marc: Awesome, Ben. Another question I had was, what about our viewers who have all their proptech or want to have all their proptech working together so that all the different processes are fast and seamlessly connected? How can we help those people?

Ben: We work with a lot of other proptechs to accommodate for exactly what people are after, with improving their workflows as smoothly as possible. For those that aren't familiar with our CRM Connections. CRMs hold the data that you end up entering into your forms. So, we thought why not streamline the process and make it a lot easier. So, connect your favourite CRM to Forms Live when you need to create a form and simply funnel most of the data through within your CRM, straight into our form's fields...I think we're going to show our viewers our integrations on their account. It's as simple as selecting the 'Connections' tab off to the left-hand side, clicking 'New' on the top right, finding the CRM that you're connecting with, and then click 'Create'.

Chelsea: There are many benefits to making this connection and it can really speed up the form completion process. For your information, we host connections to most major CRMs. Now that's not a process we can demonstrate for you today, even if we could, it's a little bit different for each connection.

So, we recommend visiting our help guide and finding information about your preferred connections there. I also did a webinar last year with a company called RESO, which stands for Real Estate Sales Online that delves into that process a little, I recommend giving it a watch If you're curious to learn more, it's available from our Learning Centre.

Marc: Well, great work, Ben and Chelsea, hopefully, that's all given everyone a deeper understanding of the productivity boosting tools that we have on offer. Now they can take those tools and apply them within their own agencies. If anyone has any questions, then chuck them in the chat or use the Q&A feature. We'll use this time to answer them as best as we can. I did see that we had a question earlier about our mobile view and tablet capabilities and just to clarify for everyone, there is no app, it is accessible from Safari, no need to download any apps but as Chelsea said, you can add that to your home screen if you need a

quick shortcut to it. Well, before we go, I would like to spotlight the Partners Program. This is something that we've established for our existing subscribers.

Basically, when you recommend Forms Live to a friend or another agency and they subscribe to the platform, then you will receive a free month of access to the platform if they mention your name. You can also claim additional months for every person you successfully refer us to - for more information on the program, then I'll point you to the Partners Page where you can sign up or you can contact Ben and Chelsea. All those details are on the screen now. And they're also happy to discuss forms and help you set up a free trial or even assist you with pricing for your office. Great that wraps us up for today. Thank you everyone for tuning in and keep an eye on our socials and our emails for future webinars.

Chelsea: Thanks, everyone.

Ben: Thank you.

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