Client Relationship Mastery: The Three Essential Tools
Webinar: 24/08/2023

Marc: Hey guys, welcome to today's webinar! I'm Marc Persico, I'm the content creator for Forms Live, and I'm joined by one of Forms Live's Business Development Managers, Chelsea Dwyer, she's also our Implementation Coach! We encourage you to introduce yourselves and your agencies in the chat as well, we'd love to know who's tuning in today. If you have any questions, chuck those in the chat or the Q&A feature there - we'll address them when we get the chance. So, today's webinar is called 'Client Relationship Mastery: The Three Essential Tools' - shall we give our viewers a rundown of what we're delving into today, Chelsea?

Chelsea: Absolutely, Marc, everyone, we decided to jump on for today's webinar because we know how hard it can be to maintain relationships with clients. They have a ton of expectations, right? And they're all falling on your shoulders! So, how can we improve communication between agents and clients, whilst improving overall efficiency? We'll tell you how with three essential tools. So, we've got Info Request, eSigning, and Utility Connections. Now, allow us to demonstrate the benefits of these features for you, Marc, shall we start with Info Requests, right at the top?

Marc: Yep, sounds like a plan, Chelsea. So, what is Info Request? This feature is pretty much perfect for anyone who's tired of playing phone-tag with their clients, you can use Info Request to send clients a draft form - and this is the fun part - they'll have the ability to complete the form's fields just as you (the agent) would within Forms Live. I mean, how many times has a client left you hanging or forgotten to call you back? With the number of missed calls getting higher and higher and higher? It's honestly discouraging, and it really stalls the to-do list, with Info Requests you can keep the ball in their court - let's detail this process, Chelsea, I'm going to give an example on screen would you mind commentating for me?

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Chelsea: Sure thing, starting on the 'Forms Page', we'll hit 'Create' to bring up a list of the forms. Now, not every form has this feature, meaning that you're going to want to keep an eye out for the forms with a little blue Info Request icon beside them, on the right-hand side. On compatible forms, you'll have an Info Request tab in the sidebar, so move to the sidebar, enter the recipient's name, email, and phone number, you'll have the option to leave a message. This isn't a requirement, but it's useful to let the recipient know exactly what information you're asking for from them. Then click 'Send Now' - It's a super quick and easy process, isn't it, Marc? Could you also show us the recipient's end, please?

Marc: Yeah, absolutely! I should be getting an email soon, there we go. So, they will see an email with a request, they will also see the message you left (If you've included one) and they'll have this button called 'View Form' - this button will take them directly to the draft form as you'll see now. This is their view, they'll click 'Get Started' and they'll be able to fill out the form just as you would! I'll show you an example here - the highlighted fields will be the ones that they can fill out, and as you'll notice, it will automatically save the data as they're filling it out. So, if they want to stop and come back to it? All they need to do is click 'Save' and they can do so once they've completed all the fields that they want to fill out. They simply need to click 'Complete', 'Yes, Complete' and then they're done, the job is done - It's super simple. The form will be immediately updated on the agent's end, which I can show you here, and yes, they can see the information inputted by the client and if they need to make any changes to that information? Then they can still make those edits before finalising the form if required.

Chelsea: That's so awesome, Marc. I mean, can you imagine how much easier your life would be with feature like Info Request? After all, it's impossible to communicate with clients if they aren't picking up the phone! Calling them every time you run into fields needing information you don't have and expecting them to answer every single time? Or send them an email asking for those things, and they only send you like two of the four? All that back and forth...find the solution with Info Request, automate the process with emails and give clients the ability to provide information in their own time - what's next, Marc? Should we talk about eSigning?

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Marc: Yes, it's good thinking, Chelsea - this is an aspect of Forms Live that excites so many people. It's inbuilt, and it's free-to-use for all subscribers, that's great because it makes signing a breeze! If you're looking to improve client relationships, then giving them the freedom to sign anywhere, anytime, with ease is a sure-fire way to do exactly that. Chelsea, would you mind commentating for me, again?

Chelsea: Not a problem, Marc. Within the form, you want to move to the sign tab in the sidebar, enter the client's name and email address before clicking 'Next', you can then include a message and CC any additional parties you'd like to have a completed copy forwarded to, then click 'Send' when you're ready...done! Another super easy process.

Marc: Yeah, I'll show you all the client view as well, just as soon as I get that email. So, they'll be emailed a signing request, like the Info Request email, they'll click 'Review Document', and they'll be taken to the document within DocuSign - they'll click 'Continue', then 'start', and be shown directly the fields that they need to complete. Then, they'll leave their signature, pretty much as simple as a tap! Then they can click 'Finish' and done! So, then it will be the agents turn to sign, and once all the recipients have signed, everyone will receive a completed copy of the form.

Chelsea: I love that feature, it's probably my favourite, and it's to be frank, it's a standard expectation pretty much within most agencies and most clients, having electronic signing as part of the process. So, it's definitely a major asset to any agency, especially when you're dealing with your clients, clients love it, and I mean love, having the option to sign from their own homes, even their offices - we all live busy lives - it grants them the ability to sign in comfort, it'll keep them happy, and I'll keep your schedule free from client meetings, which, let's face it, is a bonus as well, (Especially with some clients). Now, we promised our viewers three essential tools. So, what's up next?

Marc: Yes, we did, Chelsea. Next up, we have Utility Connections - this is a must have for all the property managers tuning in today - Basically, this feature will make it super simple to assist clients with their big move. You can connect with a utility provider and integrate an offer of utilities into the signing process, saving you the phone calls and benefiting the client with assistance on all sorts of services like moving, electrical, and many more. Now, if we're talking client relationship mastery, it's clear why this is the tool to have on your side. This will solidify your reputation as a great manager, Chelsea, if you wouldn't mind again?

Chelsea: Let's do it, Marc. First of all, the Connections Page-

Marc: Opps- the Zoom toolbar at the top that's getting in the way!

Chelsea: There we go, so the connections page, on the left-hand side, is where the providers are - enter the username and connect with the provider of choice.

Marc: Yep. That is pretty much the gist of it. You've just made a connection, simple - and I'll also just show you how simple it is for clients as well, I'll play a quick video for you, which details the signing process with an offer of utilities. There you go, they're all set to receive assistance for their big move - What do you think, Chelsea? Pretty good feature, right?

Chelsea: Yeah, it's a great feature. It makes communication with clients regarding the move and utilities so much easier for any property managers in the webinar today. We know it's not fun playing phone-tag, so make sure to give this feature a try everybody if you haven't already. It's about automating a process that otherwise would require, again, multiple phone calls or correspondence that just disrupts everybody's busy day, right? Anything else to cover, Marc?

Marc: I'll just end on this, Chelsea. Everyone, you all try so hard to keep up appearances and protect reputations and maintain your relationships with clients - that's no easy task. We, understand that. So, we wanted to give you the tools to build and nurture those relationships in innovative ways that will help everyone get the job done quicker and

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more efficiently. Hopefully, you were able to learn something today.

Chelsea: Great way to put it, Marc, it'd be great to see you all utilising Info Request, eSigning, and Utility Connections in your processes, everyone. They're such great features, and your clients are going to love the agents you become when you're using them - So, I did notice that we did have a question in the chat there as well, Marc, let's move onto the questions now.

Comment: Hi, guys, is there a way to pin authority templates to the top of a template list? I always have to scroll back five or six pages and it takes up time.

Marc: Do you know, Chelsea? I'm not so sure we do at the moment.

Chelsea: I don't think we do. But this is exactly why we have webinars like these - all the innovations that make up Forms Live are driven by client feedback, so, that would be a great update and a great feature to be able to build in, we might take that one to our development team and get back to you directly to give you an update on that.
Marc: Yeah, that's exactly right. Thanks, Alexander, we'll definitely let the dev team know about that - Anybody else have any questions? Might be all for now, if you do think of any questions later, or, want to further this discussion, you can contact Chelsea after the webinar - she's happy to tell you all about our forms, she's happy to help you set-up a free trial, and she will even assist you with pricing for your office! I'll leave her details on the screen now, and if you do need any assistance with the tools that we've mentioned today, our Learning Centre is a great place to start. You can find that from our website under 'Learn' - you'll also be emailed a recording of today's webinar once we have it ready.

Chelsea: That's excellent, again, thanks, everybody for attending the webinar today and we look forward to sharing more features and updates for Forms Live as we go!

Marc: Awesome. Thanks, guys - see you in the next one!

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