Partnering for Process & Sales Success with RESO

Chelsea: Chelsea: I'm pretty excited to start this webinar, because I am joined by Rachel Coulter, who is the BDM and Implementation Coach for RESO, which is Real Estate Sales Online. So, this is going to be hopefully the start of our Integrator Series - our Integrated Series is going to be meeting with partners that Forms Live, already integrate with and potentially integrate with in the future depending on who it is, so you can learn from your perspective, both who we are and also how we work together. Because, really, real estate at the end of the day for a lot of people with software solutions now is about how all of these solutions can talk to each other to streamline your workflow. This was really the prompting idea for the webinar, and also for the Integrator Series. So, welcome everybody to the webinar today, here I have my special guest integration partner, and lovely friend, Rachel Coulter from RESO - welcome, Rach!

Rachel: Thank you so much, Chels - Hi, everybody, thanks for having me.

Chelsea: So, sales processes are tough to maintain at the best of times, and we're all looking for ways we can streamline them and move them and things along in the most efficient and beneficial way for all parties. Today we're going to be covering how RESO works with Forms Live, what forms the integration supports, the integration's benefits for both agents and clients, how to view leads and track insights, and more. So, here's a quick rundown, firstly, of Forms Live. For those of you who don't yet know Forms Live, we offer legislatively compliant forms for residential sales, and property management, plus some commercial, and our annual subscription gives our clients access to unlimited forms, including built in eSigning. Our annual sub starts at only $499 per year for unlimited forms for up to four users - and as I mentioned, that includes 1:1 eSigning so each user can track their own documents. The integration with RESO allows us to assist you in promoting a paperless process from the sales agency agreement all the way to signing on the dotted line with successful buyers so you can seal the deal. But I'll let Rach talk to you more about that. Take it away, Rach!

Rachel: Awesome. Thanks, Chels. RESO is an online offer management platform to help you manage your buyers right through from initial meetings, right through to contract. It's an efficient way for agents, vendors, and buyers to interact with the market and each other - and it's putting real time offers, contracts and information right at your fingertips. So, it's like your pocket assistant when you're out on the road. It's packed with powerful features that simplify the offer process, improves communication, and it helps you close your deals faster - and at the end of the day, that's exactly what we want to do.

Chelsea: Fantastic. So, would you mind, Rach, showing us how it all comes together?

Rachel: Love to, let me just share my screen - okay, so hopefully, this screen should look somewhat familiar to you. But this is your Listing Authority. So, you have your vendor who's signed on the dotted line, you're going to start marketing your property, you would just come into Forms Live, and you would open your Listing Authority - on the right hand side panel there - you would just scroll across to RESO and just follow the prompts there and we click on 'View Sale' and the integration that we have, you can see it's automatically opened a sale in RESO and it's brought across the details with it. So, now there's a little bit of setting up we want to do before your first open. So, with your five tabs across the top, this is how we navigate around RESO, we go to our documents tab, upload anything that you want to make available to your buyers, and they'll be able to access it 24/7. So, this is just an example of some of the things that you can upload. You can see here, Section 32 - and RESO has a built-in acknowledgment that you can add to any documents that require an acknowledgement - and you as an agent will receive an email as soon as the buyer does acknowledge that document. And that's just some examples of other things that you can have there as well. So, we're ready to invite our buyers, you're at your open on the weekend or whenever you're open may be, and you're using your app through your CRM. So, RESO integrates with most major CRMs, you're registering your people at the open, and you'd be saying something like, "It's great to have you attend today, after the open today you're receiving an invitation inviting you into the sale, where you'll be able to view more information and you can use that same link to make an offer as well" -

Rachel: So, we after your open, jump into RESO and we would just click on invite buyer, I've set up my integration with ZENU, but that would say whichever CRM that you have, I have found that my connection today is a little bit slow, Chels, sorry about that, guys!

Chelsea: Okay, it's just a little bit like me without caffeine, Rach!

Rachel: Oh, there we go, all of my buyers that have registered to that open. So, we would simply click on 'Select All' and then 'Send Invites'. So, your buyer will would then receive an invitation into RESO. They simply click the link and create a password, and they can access all of those documents and RESO guides them through a series of questions, capturing everything that you require under legislation to fill out a contract - alright, so we can now track everything that happens with your buyers, so if your buyer accepts an invitation or makes an offer, you will get instant notification, and once you get that you simply click on the offer screen, and we can see everything that's happening. So, I can see I've got three offers, and I have another buyer who hasn't made an offer yet - I can track all of the documents that they're opening. So, I can see they've opened these documents, how many times they've opened them, and the date and time they've opened them as well. So, that's giving you really good insights into how interested that buyer actually is, the nature of RESO being online, that means that they can change that offer 24/7. So, you may have a chat with them, letting them know about competition, they can chat with their partner, you know at night after work, and you might wake up to a revised offer that's come straight into RESO, then our little icon here - the terms and conditions - is going to show their offer as well as their conditions. And we actually have an inbuilt lead feature, so, anybody you invite into RESO, you invite every inquiry, they can actually request an appraisal. So, I can see this buyer here would like to know the value of their property they actually need to sell to buy, and they're an investor, so you're getting extra insights that you can add to your database. So, when the markets a little bit slower, and you start doing some cold calling from your database, you've got that extra information there as well - and hopefully some listing opportunities as well - all right, so we've got all of our offers, we of course, now want to share them with our seller, so we can find out who the lucky buyer is.

Rachel: So, if we go back to our sales tab, click on 'Generate Seller Report' and we've got an inbuilt report that is going to show all of the details about the property, the stats of your buyers and acceptance, all of your offers. You can choose to customise this and show and hide sections, and most importantly, we've got our offer, the conditions a buyer has submitted with their offer and where you've negotiated your buyers to and from...

Chelsea: Though, you can actually transfer all that stuff back to the contract and Forms Live later!

Rachel: Yep, you've got all of your information that you need to fill out their contract, there's mandatory fields, making sure we capture everything that you need. One final thing to say about the seller report is that you can share it as a live link. So, a lot of our agents at the moment are using this as a listing tool, vendors love transparency, you share a live link and they're actually going to get real time updates of the offers as they come through. But that's an optional feature you can choose to share live or not. So, totally up to you as the agent, you're in control! Once you've got your buyer, you can communicate using SMS, 1000 free SMS per sale - you can draw this out, or close, do whatever you need to do. Your vendor has chosen that lucky buyer, and Chels I'm going to hand it back to you so we can see how we can go to contracts.

Chelsea: That's awesome, Rach! There's so many features and I love the transparency and visibility it promotes for buyers and agents. Now that we've found the successful buyer though it's time to sign. So, once you have populated the contract with the buyer's details either outside or within Forms Live. If you're using Forms Live for a particular contract, it should be all ready to go. If you've been provided a contract though by the seller solicitor, which happens more often than not in Vic, and potentially is sent to you, then you can still send it out using Forms Live using our blank cover page option. So, all you have to do is you select the cover page, drop down the assigned tabs, and send it on its way to the buyers and sellers. So, here's a quick video to show you how that works. Now, this is the end-to-end process, probably what I would do as a salesperson, if you already get your contract ahead of time is I would already prepopulate the sections for the text field and the signing sections to be able to just lock and load it and send it out as soon as you get the buyer's details, but here we go...

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Chelsea: What do you think, Rach, will this make a difference to your RESO clients?

Rachel: Absolutely. One of the main questions that I get asked, Chels, is "Can I upload my own PDFs?" As you can see there you absolutely can and "Can you attach your own signing fields?" so everything is covered there, any additional buyers and the contact details you're needing, you're capturing all of those from RESO. So, for signing, you've got every single contact that you need in there.

Chelsea: Absolutely, I mean, we know how important it is to lock that buyer in once negotiations have been completed - so this makes it easier, and obviously a lot more trackable as well. So, we've got a little bit of time left for some Q&A, if anybody has any that they have put in the chat? So, what I would like to offer everybody is the opportunity if they want to, to take down our contact details - on the right hand side, you'll see there's a little QR code for both Rachel and I both for Forms Live and also for RESO, so that actually takes you straight through to our Calendly booking page. If you're wanting to learn a little bit more about either Forms Live or about RESO, and potentially about the way they work together, then you're more than welcome to contact us if you'd like to, to ask those questions. And in the next couple of days, you'll also be receiving an offer via email, both from RESO and also from Forms Live- looks like we've got a little Q&A there.

Rachel: We have a question, "Will the information autofill into Forms Live?" I'm assuming you mean from RESO into Forms Live. So, at this stage, no, because we're not sure where your contracts coming from, it's a PDF, but we absolutely are looking to integrate further and improve that integration - so it's certainly things that we can look at. But our aim always is to make it as easy as possible, so we are always looking at solutions to be able to do that for you. Everything is available from the RESO screen at this stage capturing everything you need for every single contact - and it certainly makes it easy for you - and the sales advice to send to your solicitor as well to get those contracts completed.

Chelsea: Yes, and I think that's really half of the battle sometimes isn't? With buyers is getting him to give you all the information that you need to kind of get everything finalised. So, I suppose the beauty that I can see with what you have on offer, Rach, is the fact that it's pulling in all those requirements based on legislation, and the questions that are needed to be answered to be able to complete a contract.

Rachel: Yeah, and being mandatory fields as well as making sure we capture everything you need!

Chelsea: Yeah, exactly. Well, that about wraps it up from us for now, if nobody has any more questions, so as I said, you've got those QR codes there to be able to book meetings, check your emails, in a couple of days, we will be sending out a special offer, they're always so special. And I'd really like to thank Rach for her time today in joining us and obviously all of you as well for taking time out of your day to learn a little bit more about what you do and how it all works together and what we do so - thanks again!

Rachel: Excellent. Thank you, everyone.

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