

Coldwell Banker Mountain West Real Estate

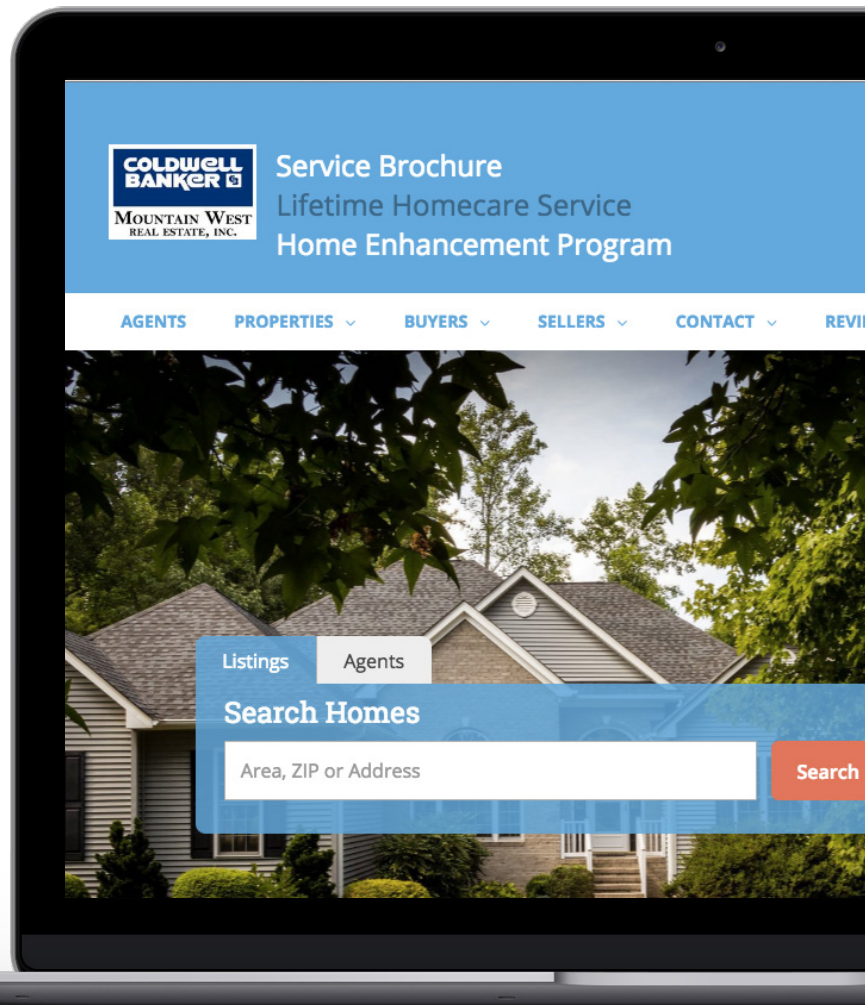
Using DocuSign Signature and Transaction Rooms allows Coldwell Banker Mountain West to run their brokerage digitally – increasing mobility, compliance and cost savings.

The Company

Coldwell Banker Mountain West is a residential real estate brokerage based in Salem, Oregon. Due to their dedication and commitment to customer service, Coldwell Banker Mountain West has been consistently voted #1 in residential listings and sales in Salem. They have 85 agents who constantly stay up to date on real estate best practices in order to provide top notch service.

The Challenge

In 2013, Oregon Real Estate Forms mandated that the state's real estate forms must be done electronically through zipForm®. In order to comply with their state's regulations, Coldwell Banker Mountain West needed an electronic signature solution. They went a step further and took advantage of this opportunity to become a completely digital brokerage with electronic signature and transaction management. Coldwell Banker Mountain West was eager to get an early start with digital transaction management because, "you can't deny that paperless is coming. And it is going to put us ahead of the curve in a couple of years when everyone is just getting started and our agents are more experienced" Advertising/IT Manager, Tina Kessler explains.



Top Benefits Achieved

- ✓ Increase savings and efficiency with organized, digital storage
- ✓ Increase agent mobility and access to important documents
- ✓ Increase compliance

Solution

For Coldwell Banker Mountain West, DocuSign offered the best solution because “zipForm®, eSignature and Transaction Rooms all go together and integrate so well that we decided to do the whole entire package at once,” says Kessler. An important factor was how easy it was to open a form in zipForm® then fill out data fields and capture signatures seamlessly with DocuSign.

Results

Kessler remarks that implementing DocuSign, “allowed us to boost our tech offerings as a brokerage and also saved costs for the agents individually.” Since onboarding all the Coldwell Banker Mountain West real estate agents the brokerage has seen many benefits for their brokers, agents and clients.

Before Transaction Rooms, Kessler explains, Coldwell Banker Mountain West was “storing boxes and boxes stacked high in rows in an airplane hangar.” “There was a huge issue with storage,” not only because of the extra expense each month, but also it was inconvenient. For example, “when a principal broker needed to find a file to address a question they basically dressed up in tennis shoes and grubby jeans because they were going to go dig through dusty boxes all day” Kessler remembers.

For this reason, Transaction Rooms as been very helpful for brokers, “not only because it meets the agency’s requirements for document review, but is also gives the principle brokers easy access to documents. There is a ton of value in the fact that when a client or escrow officer calls with questions the broker can say ‘give me a moment to look it up’ instead of ‘give me a few days so I can get over to the storage unit and fish it out.’”

The agents also benefit from the easy access Transaction Rooms provides because “they can be sitting at their kid’s soccer game, access Transaction Rooms from a mobile device and send documents out. It’s easy to share documents with clients and escrow officers whenever they need to.”

DocuSign also helps the agents to offer a superior customer experience. First, it allows agents to stay organized so they don’t need to worry about paper work and can spend more time face to face with clients. Second, “it makes it a lot easier for agents and clients to deal with the things that just come

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up in life.” Kessler gives an example, “when you’re within a week of closing and your client has a Hawaiian vacation that they planned a year ago, to be able to say to them ‘Really that’s no problem. We have all of your documents, they’re all stored online, and we can email you anything that you might need to sign or review, go have a good time,’ that’s really great.”

The entire brokerage is now more compliant and more secure thanks to DocuSign. Transaction Rooms helps agents get their files in correctly and on time. Kessler notes, “we have a higher level of compliance than we did when we started out.” Also, it’s a great security asset because “all those paper documents that might have sensitive information like account numbers, proof of funds, etc. aren’t traveling around in the trunks of agents’ cars anymore. They’re not rolling around suitcases with important files. It’s much more secure storing the documents online.”

Coldwell Banker Mountain West also feels confident knowing, DocuSign cares about their success as a customer. If they have a question or concern, Kessler says, DocuSign’s “tech support has always been really great and really prompt.” Also, “they’re always making improvements and listening to customer feedback. They’re always taking steps to make it easier and faster to do the jobs we need to do.”

Kessler is pleased to say “we see DocuSign continually becoming more valuable for us in making our workflow seamless for agents, brokers and clients.”

About DocuSign

DocuSign offers transaction management services and is the NATIONAL ASSOCIATION OF REALTORS® Official and Exclusive provider of electronic signature services under the REALTOR Benefits® Program.

For U.S. inquiries: toll free 877-720-2040 | DocuSign.com/remax

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