

The Future of Forms in SA

Mark: Good afternoon to those who are walking through the virtual doors of this zoom call. We'll be starting up in about two minutes, thanks for coming along. Okay, David, are you good to go?

David: I'm good to go. And hello, everyone!

Mark: Okay, good afternoon, everybody and welcome to this first session of 2025, of Lunch and Learn with Forms Live, and I'm joined this afternoon by David Howell, the CEO and founder of Forms Live. Good afternoon, David!

David: Hi, Marc, thanks for hosting!

Mark: That's a pleasure. Today, we're going to cover off several issues, including the new competitive landscape, the new contract that has been specifically written for the contract of sale in South Australia. And we will dive a little bit deeper into Forms Live as well. We'll look at the single sign-on with Microsoft Office and their new technology, Entra-D. We will do the same with Google sign-on for those who work in the Google workspace. And then we're going to look at one of the most powerful features of forms, and that is the integration with CRMs and how you can make the most out of them and David will explain that along the way. I'd just like to suggest that you put any questions you have for David in the Q&A box, and we'll get to them at the end of the call. So, thank you, David - let's kick off, and let's focus on the form's real estate scene, if you like, and in South Australia, it has changed suddenly. So, can you tell us the situation now and how Forms Live is approaching it?




David: Well, obviously there was a dramatic change in in the market on the 5th of December 2024, Forms Live entered the market with a competitive offering. Now giving real estate agents some choice in terms of what forms platform they can use...and we think we still have the best platform on the market.

Mark: So, you've had a good response as well, haven't you?




David: Yeah, fantastic. I think most of the REI Forms Live agencies have logged in and used Forms Live to, I guess- we did that for a couple of reasons. We are honouring any existing REI Forms Live subscription, even though there's no benefit to us on that, that's just to make

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sure that people can log in and use the platform and not be disadvantaged, I guess, during this transition.

Mark: And you've redone the forms, and you've used a local legal firm to make sure everything is accurate and relates to South Australia.

David: Yeah, that's correct, so we do that across the country. So, I think we are the only forms platform in Australia that services the entire country, and we do that by partnering with the local expert in forms and in South Australia, that is most definitely Lynch Meyer and their local team here in Adelaide, and obviously, we're in Adelaide too. So, it means- I'm passionate about it, I guess you could say.

Mark: So, in fact, your local connection is very strong, isn't it? You are a South Australian, South Australian company, and you've been in business for 19 years! So, tell us a little bit about your local connection with South Australia.




David: I'm born and bred South Australian started I did an electrical engineering degree at Adelaide University. But while I was studying, I actually did a math degree as well, because I was getting sick of engineering. But while I was studying, I was working part-time as a computer programmer, and I built up a bit of an expertise in office documents, and workflow, and kind of fell into real estate, 19 years ago, by doing some consulting around forms and agreements. And ultimately, what's funny is I didn't actually launch our first platform in South Australia, I launched it in New South Wales, then we moved to WA, then we came to South Australia, and then we gradually picked up the rest of the country. But yeah, my team is- well, prior to COVID, we were all Adelaide-based. Now, since COVID, we have a bit of choice, but all our team are in Australia and work here in the office, in the city, at 122 Sturt Street, if you want to come say hello! Otherwise, they worked remotely from their homes.

Mark: So, I mean, there's a lot of competitive advantages based in the knowledge of the market, such as you have gained over the last 19 years. But there's also advantages in being a specialist company, and it not just being tagged on to other elements of a business. I mean, this is- this is all you do, right?

David: It is. So, it's definitely our niche. Our expertise is in forms. You know, part of my team, we call the Form Gurus, and they're doing the form edits and liaising with legal

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counsel and or customers around form changes, legislation changes, even court cases that might affect forms as well. So, yeah, it is our expertise, and that's one we take very seriously.

Mark: So, the kind of key competitive advantages that our audience today will be hearing as we kind of go through the business year, what are you going to be talking about?

David: As I said, forms being our expertise, really, our focus is around making sure our forms are compliant, making sure that, you know, having a technology background, and we're a technology first company, making sure our platform is secure, and then making workflow and efficiency a priority as well. It's a few pillars, but that's what we take as priority.

Mark: I mean, nothing gets simpler in life, and certainly not in business, not in the business of real estate, as our audience would all understand. And contracts and legislation are always being updated. And you've recently updated a contract of sale, haven't you, for South Australia. Can you tell me a little bit about that? Because, in fact, it's a brand-new contract of sale, isn't it? It's not an updated version. Tell me about that!




David: I think it's probably one of the biggest advantages we've got right now is our forms have been drafted from scratch. So, we're not talking about a form that was 20 or 30 years old that has been modified, modified, modified, modified over the last 20 years through the legislation changes to know. What we've done is kind of started from scratch, created these new forms which are only looking at the legislation as of today. So, our contract of sale is a very important one, obviously, being one of the most important forms in the platform. However, I would say it is one of the simplest forms we've got. So, it is the way it's laid out and the way it's structured by our legal team at Lynch Meyer has made it very easy to use, very easy to consume, both from an agency or a conveyancer perspective, but also from a layman's perspective as well.

Mark: Right! So, talking about competitive advantages, or, shall we say, major efficiencies that you're offering real estate agencies, many principals see the integration of Forms Live with their CRM as a major benefit. So, why is that integration so important?




David: It's a good question, I guess so- having a technology background, we build our platform, what we call API first, so we're always thinking about our partners, our software partners, and how they can utilise the forms and agreements easily. You know, things like electronic signing, making sure forms get updated when legislation changes and the CRMs

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are not using old forms, things like that. So, really, that becomes the key, or one of the key drivers, from a principal's perspective. The other thing is, what is interesting, is you'll find that a lot of agencies will have multiple CRMs. You know, they might have one CRM for property management and one for sales and often, the common denominator is Forms Live. So, whether your PM team is using one CRM and your sales team is using another CRM. All the forms can be generated within Forms Live. Doesn't matter what system you're using.

Mark: So, another, another element that concerns a lot of principles is the ownership of data. And ownership of data is something that is discussed right across the economy, because data is, you know, to use the cliches, the new oil and so on and so forth. So, where does Forms Live sit in terms of ownership of data...




David: We take this very seriously- I believe, you know, that's why we've worked so well with the we with the industry over the years, Dynamic Methods. Our stance on data is the agencies are putting in the information. Therefore, the agency is in control of that data. So, if an agency wants us to remove that data, then we will comply with that. So at end of the day, what you put in is yours, and we, you know, are the custodians from that perspective, obviously we want to be able to use that data, but I believe we would be the only...or one of the few forms providers that do not give data to any other third-party.

Mark: Okay, so let's talk a little bit about some of the innovation that you've done very recently, and I'm referring especially to single sign-on, and maybe we can talk about, first of all, what you've done for those in the audience who work in the Microsoft environment. whether it's Microsoft 365, Dynamics 365, or whether they use Azure, you've worked with Entra-ID and implemented that, so maybe tell us a little bit about that.




David: We are working with some of the larger agencies around making authentication seamless. Because obviously it's a very, very hot topic now around security and privacy. You know, there's a lot of things going on around the country in terms of phishing scams through email and all those types of things. Now, while we've had multi factor authentication with Forms Live, REI Forms Live, and Realworks, probably for the last two years, we've never gone through to the Single Sign-On path with Microsoft Azure- now Entra-ID, or Google's Single Sign-On. So, we are releasing this feature tonight, across South Australia, and that means if you use Microsoft office 365, you'll be able to use that as your authentication to log into Forms Live. So, you won't need to put in your username and password, you'll simply be able

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to click the 'Sign In with Microsoft' button and approve the link, and then from that point forward, you'll either be signed in automatically, or you click the Microsoft button, and you go straight in. This we're leveraging the authentication method that Microsoft is using, so it also gives us advantages down the track for other, or what we call user provisioning, so one of the things that's very important as a principal is if a team member leaves your agency, you should deactivate that user account immediately. So, the advantage of having it hooked up with, say, Microsoft and Entra-ID is that the whole process can be automated as well. So, you're from a safety and security perspective, you don't have to worry about these types of things.

Mark: Now you've done something similar with Google workspace too, is that, correct?

David: Yep, identical! So, the same thing, Google workspace, used to be called Google G-Suite, it's had a few names, but now, it's called Google workspace, again, you can just click the button and sign in based off your Google authorisation.




Mark: So, while all this innovation is going on, you've still got to keep track of all the compliance and the changes in legislation. And it kind of feels like a never-ending journey, I'm sure it does for those in real estate, as much as it must do for yourself. So, when it comes to all these changes, how do you keep up with them and make all the forms compliant. What is your process?

David: So, same process around the country, so obviously we partner with a forms legal counsel. So in our case, Lynch Meyer, they keep an eye on things like legislation changes or upcoming changes, and any open court cases that may affect these types of agreements, and then through communication...so very, very tight, small team, from that perspective...any form changes that come through, our Form Gurus make those changes here internally, and then we go through a very rigorous process for QA (so Quality Assurance) to make sure those changes get approved prior to going out. For example, our contract of sale went through a change for the 1st of January, around the Capital Gains Tax changes, and luckily, in that case, we could push those changes out prior so that the contract was valid in either case.




Mark: I imagine that it must be difficult for accuracy. I mean, a real challenge for everybody dealing in anything legal, right, accuracy is the number one thing? Talk to us a little bit about that process, defining the accuracy element of the contract.

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David: We take it very seriously, from that perspective. That's not to say there aren't mistakes made, but I think the advantage we've got through Forms Live is that we can have a form update...which I should explain how that works, so let's say that there is a legislation change overnight, let's say that takes effect at midnight- at midnight, all of your draft forms that are affected by that change have an update flag, and the next time you go into that form, those changes are automatically applied to any draft form, of course, any finalised form or any form that's been executed remains the same, because that's been finalised, once it's finalized, it cannot be changed. But any draft form comes through and gets those updates. So it's very quick and easy, from your perspective as a customer to use those new forms. Where possible, we'll give you an update on that and it's interesting, you know, we get some feedback saying "I don't want to hear about these changes!" then we get other feedback saying that "It's great that we're sending out this information to help guide users on what's been happening".

Mark: If you're getting encouragement and complaints all at the same time, you're probably doing something right! So, like, right at the beginning of our call, we promised that we would talk about the future of forms and how the technology might change, how work processes might have to respond and, of course, legislation that is continually being redrafted and modified. So, perhaps you can tell us both from a real estate agent perspective, but also a property manager perspective, about what is coming down the pipe. Let's, start with the agents first but we will come back to the property managers.




David: So, the big one is around the Tranche 2 of verification of identity, or AML/KYC, so agents are going to have to do this process, which manually is a pain, but it's a process that must happen. So, what we can do is...we've automated that by partnering with Scantek who a verification of ID provider which then allows us to do all this through Forms Live. So, you don't have to jump into another platform or anything like that to be able to issue a verification of identity. You can just initiate it from Forms Live. It goes out, the consumer does the ID, and then the results come back in. Probably the most important thing from a security and safety perspective or privacy as well, historically, you'd be storing, and this does come into play for property managers as well, you would be storing things like photocopies of driver's licenses or photos of passports and things like that. What we do, because we're partnering with a VOI provider, is once a verification has been completed, we get a

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certificate to say that verification has been completed by these methods, however, we don't store any photos of the IDS themselves.

Mark: Where are they stored?

David: So, they will be stored with the provider, and then through records management, and again, that can be managed internally, by the agency, they can be deleted after a certain period. So, there's that level of security, that if someone were to get into your account, they couldn't use that information, or there is no value to it from that perspective.

Mark: So, I mean, one of the basic everybody asks the question, and so I don't want to be a rebel, I'm going to ask the question too...artificial intelligence (AI) what do you see coming down the pipe for agents or agencies in general?

David: Look, I think AI will have a big impact. However, I don't think it will be straight away. We are investing heavily into AI. However, we're not rushing into anything either. Fundamentally, I believe AI will change the landscape of how you interact with forms as opposed to it doing things for you. If that makes sense, it's more an automation workflow tool. So, I can see AI becoming your virtual assistant with forms, right? As opposed to completing forms or trying to automate that type of thing. So, it more around conversational user experience that you might have with Chat GPT, right?




Mark: So, we've discussed verification of identity, we've discussed AI, I guess we should talk about anything that's specific to the property manager...so let's talk about their environment for a moment.

David: Can I share my screen and just give a quick demo? I think property managers are our champion users. You know, they're very form centric, which is great, but I also feel for them in a lot of ways, because they're always flat out doing a million things, and forms, I think becomes, well, we don't want forms to be a pain - we just want them to be easy and streamlined - so what I wanted to do was kind of show a few things. As you can see here, we've got our Google Sign-In, or our Microsoft Sign-In, or we can just sign in manually, I'm just going to click this and look, I'm straight in!




Mark: Wow you did a Microsoft demo right there! No blue screen!

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David: No blue screen! No crashes yet! Yeah, now I am using our staging side, so please- yeah, some things can go wrong, but I'll go through here and show you quickly a few features. Now, one of the things is, so you've been able to search forms for via address for a very long time now, but I think it's one of those features that nobody realises exists, and that's probably our fault for not kind of making it more obvious. But what I'm going to do, I'm going to create another form. So, I've got one form here for when 122 Sturt Street, I'm just going to create another form very quickly...I will do a property management- a tenancy agreement. I'll just fill in those details here...so, all I've done here is filled out the property address of the form, I've done nothing else, I'll put anything else in and close the form. So, now we can see here, we got two forms here, one for 122 Sturt Street, which is an agency agreement. And 48 Gordon Road for Clarence Park, which is a tenancy agreement. Now I- can up here in the Search Toolbar which exists now for all our Forms Live users now...I can start typing 122 Sturt, and it comes up with auto complete. Now, if I pick Sturt Street, Adelaide...it will filter down into that. Any form created for that property will appear in this list. So, I can clear that, and I can go again...I'll go 48 Gordon Road, Clarence Park...and there we go, we filter down into that as well.




Mark: So, it sort of stops the cyber entry error, and therefore it increases the efficiency of the user, correct.

David: Yep! The other thing we're launching as well is our form filtering. So be able to go through here. Can see any form that's in draft or anything that's out for Info Requests, anything that's finalised, signing, signed, ready to sign, which is a good one...so if there's forms, so, particularly for property managers, we find the head property manager will need to sign a lot of forms for the their team at the end of the day. So, what they can do up here, on this top right button is called action required, there'll be a little number here of how many forms you've got to action, and that's around the signing process. So, if I click that button, it will filter down to whatever forms I need to sign, and it just allows me to do that really quickly and easily. Also, I can filter by types, so sales forms or property management forms, or even the actual form itself. So, if I do the exclusive agency agreement, then it filters through there. So, all these, these powerful filters coming out as well.


Mark: Is any parting message for the audience today around forms and your offering?

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David: What I would like to impress and, look, you know, I know there are some comments around new forms being different, so there'll be a lot of feedback around forms. But what I want to impress on the group today is, if you have suggestions, please send them through - Phil, I can see some comments about some suggestions, I'd love to talk to you about those suggestions and see what we can do! Our forms are guided by our customers, so where we can and legal counsel allows, we'd love to be able to do these things.


Mark: Fantastic! That's the end of the Q&A questions we've received - thank you everyone for asking your questions it's much appreciated. It's time to wrap up, and firstly, I would like to thank the audience, for coming along and listening to David and myself. Our next Lunch and Learn will be on Verification of Identity (VOI) and more on the integration of partners and how you can leverage those. So, David, thank you for taking part this afternoon, I'm sure we all look forward to speaking with you again for the next session. Thank you everybody for attending.

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