



Real Estate Document Template Software

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<https://github.com/rlr294/CS386-Spring17-Group16>

Deliverable 1.2 - Consumer Discovery

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Value Proposition

Drafting Documents: Quick, Easy, and Signing Integrated

After talking to potential consumers for this software we found three main things that they are looking for in a software like this one. First, they want it to speed up the process they go through to fill in all the required information. Second, they want it to be simple to find all the fields you need to fill in and make it so you cannot miss things. Finally, they want it to be integrated with signing software in a way that consistently works. We feel this

Consumer Segments

Real Estate Agent - As the main buy/sell/renter for all clients, must maintain a strict regiment of quickly drafted documents that are frequently handled by themselves, their clients, and the property owners. This involves a myriad of documentation involving official documents and drafted documents that must all be handled by software nowadays.

Transaction Coordinator - As the real estate professional who deals specifically with the deadlines and transaction paperworks as part of real estate transactions. The deal with a large load of contract deadlines and payment deadlines that would greatly benefit from the ability to quickly draw up several large documents involving these deadlines and transaction documentations.

Property Manager - As the main handler of rental rates and tenant advertising using current tenant referrals, drafting certain documents may be a bit more time consuming considering you are pulling information from your tenants instead your own official documents. Putting

information in a quickly formatted draft would be helpful.

Interviews

Brad Dette

He dealt with drafting mostly in real estate. He uses software provided by his company that pre fills out a lot of the documents that he works with. He is happy with how the software works, he has run into no performance issues and he does not have to search the documents to find anything. One problem that he has with it is that the signing feature that is included with this software does not work all of the time, so he has to download what he has been working on and upload it to DocuSign.

Bob Davie

Bob told me a lot about why having software to automate parts of the legal process is important. Two of the major reasons to have the process automated is to save time and to shield the owner and agency from legal trouble. He told me about a software that he uses called AppFolio that does what we are planning to do. He also told me about some things that he wished AppFolio could automate. One of these things would be to tell the agency if the renter has valid insurance and to ping the renter if their insurance is about to expire. He also wants to have something that could send maintenance requests to businesses that they already have on file. This would ideally check the business license and insurance and also check the license and insurance of the individual contractor as well. Let me know if you want me to clarify anything to you because Bob gave me a lot of useful information and ideas.

Gary DeGiso

Told me that the drafts he deals with are normally provided by the company he is a part of. Said that most of the time he does spend on the drafts is just changing around the costs, the days the properties are being used, names and such. Hard to understand him over the phone so didn't get too much out of him without being rude. He did say that if we did somehow manage to quicken up the time of filling out the papers that would be great. Same thing with the fact he has to use docusign, however he sounded indifferent to that fact. Also told me that his higher up might be able to provide us with some draft documents or something along those lines. Once again, Could not really understand him over the phone.

Jen Dornsife

Said she is already using a software provided by the company she is a part of provided. Mentioned that the program already works pretty well. If I were to look for a better source of information, to try to interview her higher up. Nothing really different from the other interview though, that if we could still speed up the processes she already uses, that would be great. Same issues with Docusign mentioned having to use it in conjunction with the software she is already using, this involving the the Docusign process to be able to use it.

Joyce Doherty

Joyce told me that she usually drafts several real estate documents a week and it took up most of her work day to draft these documents. She said a software that would speed up this process would be very valuable to her. She said that she uses several different software currently for this process which was part of the reason it took her so long to process these documents. She said that if there was one piece of software that did what all the other software she uses did it would be very useful to her.

Karen Pritchard

She told me that she usually drafts documents 5 or 6 times a month. She said that it usually doesn't take too long only 15 to 30 minutes per document but she said if there was a way to make it go faster that would be very valuable to her. She said that the most time consuming part of the process is that there are usually several different documents that she needs to fill out at one time. She said that she uses a software to draft her documents called Winforms that she is happy with the only problem she has with it is the e-signature she said that it was very confusing as she much prefers DocuSign. She also said that the most important thing to her for a software like the one we are making is usability she said that she wants a program that is easy to use and something that you don't need to be computer literate to use.

Tammy Sauter

Tammy talked about how she currently uses CarForms to draft her documents. She brought up a few issues she currently has with it. Her first complaint was how the software requires you to go through the form yourself and locate the fields that you need to fill in. She thinks it would be much better, especially for newer agents, if instead the software prompted you for each field to either enter something or make it clear you want to skip the field. She felt it is very easy to accidentally miss fields with how it is currently. Her other complaint was the integration of CarForms with DocuSign. She currently doesn't use the integration and instead just downloads the document then uploads it to DocuSign. The integration is inconsistent, meaning required signatures and dates may be missing when using the integration. She feels a working integration between the drafting software and the signing software would be very valuable.

Libby Rogers:

Libby is the one who initially requested this software be made. She makes multiple vacation rental agreements every day and they never change except for the information about the renter. The current software she uses (CarForms) requires her to go through and find each spot that changes to fill in the new information. She wants some software that asks for the information it needs then goes and fills in the information itself. She would also like the software to be able to send off emails containing the document to the person who needs to sign it. She feels this automation will speed up the processes of drafting these documents significantly and would be valuable to her brokerage.

Group Participation

Rex Rogers - Scheduled the interviews. Conducted two interviews and wrote up their results. Helped put together the deliverable. Wrote the value statement. Updated the GitHub repository.

Anthony De La Torre - Conducted two interviews and wrote up their results.

Emilio Sifuentes - Conducted two interviews and wrote up their results. Wrote the consumer segments.

Robert McIntosh - Conducted two interviews and wrote up their results.

Nick Reader - Has not been reachable or in class at all. He still has not even joined the bblearn group.

Even though our group is technically 5 people we have one member who has not been seen at all. We felt it was reasonable to consider our group only 4 people considering this, thus we only did 8 interviews. It doesn't seem reasonable to have to do extra work for a group member that doesn't contribute.