

# Automating Real Estate Documentation with SMS Messaging

Real estate agents have their hands full managing complexity of all the forms and documentation they need to finalize the contract on a commercial or residential property. The time and effort of tracking all those documents, reminding clients to send specific information that's missing and just plain communicating about it all, well, it's a lot.

Document workflow solutions can help manage the flow of necessary documents. Yet they don't necessarily communicate what's needed from clients in an effective way.

Emails sent to request additional information aren't always read. Let's face it, it's easy to overlook that email and move on with our day. That means agents and their staff have to personally get involved in tracking all that documentation while pestering clients to send the required information.

Text messaging changes that.

## Simplify Every Deal

Advanced conversational text messaging solutions like SMS-Magic give real estate organizations the opportunity to simplify and improve their entire documentation process.

How? By using automated text messaging to remind clients when they need to supply information, sign a form or provide other feedback. Since 99% of text messages are read within 3 minutes, and nearly 50% of people respond to these messages, you'll get the documentation you need in a much faster and more effective way.

Here's how it works:

**Create automated workflows.** Just set up a simple workflow that shows all the documents you need. Then, set the timeframes for when those documents need to be returned, across the timeline of the workflow.

**Add your message reminders.** Next, you can add text message reminders ahead of the due date for documents, as well as past due reminders.

- For example, you can specify that a message is sent to your client 5 days ahead of the necessary return date, the day before and the day of the return.
- If the information isn't returned, you'll be alerted. You can either reach out personally or trigger a new set of messages that lets the client know the escrow is in jeopardy.
- All of these reminder messages trigger automatically, until the information is received.

**Offer Personal Attention.** As part of your reminder messages, you can include an auto-response keyword (like HELP) that clients can text back to you to ask for help. When they respond, an agent or team member is alerted and can immediately reply via text and set a time to discuss how he or she can help your client.

By automating reminders and the documentation process, you get all that time back to focus on doing what you want to do, helping your clients find the best property to meet their needs. You also assure that every contract process flows more smoothly and delivers on-time escrow results. Which makes your clients love you even more.

Source

Complexity of mortgage documents

<http://www.asurity.com/blog/to-solve-mortgage-compliance-complexity-look-to-einsteins-principles>