

Case Study: Grant Sauer Notary Public + The Portal

Creating efficiencies and results



About Grant Sauer Notary:

Grant Sauer Notary Public offers professional legal services including real estate transactions, notarizations, and estate planning. Traditionally, they initiated transactions and exchanged documentation through methods such as phone, email, or in-person.

As we begin working with the Grant Sauer team, we identified a few challenges:

1. Complex process for gathering information

Their existing process created a scattering of documentation leading to challenges in locating specific information when needed, in a timely manner.

2. Lack of security in information transfer and storage

Without encryption best practices in place, the transfer and storage of documentation wasn't secure. This created an increased risk of sensitive information being accessed by external parties.

The Portal in Action:

Natasha Bergen, Grant Sauer's lead conveyancer and office manager attended a webinar hosted by ReadyWhen's founder Jessie Vaid, where he introduced The Portal; an online solution designed to create efficiencies, storage, and encryption best practices.

After meeting with ReadyWhen's implementation team, the Grant Sauer team began to leverage The Portal so they could:

- Onboard all conveyancing clients
- Securely exchange and store sensitive documentation
- Quickly communicate any legal requirements necessary to complete their transactions.

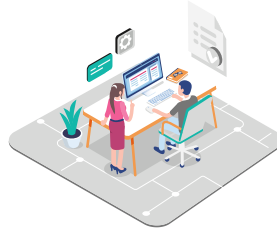
160%



Increase in clients added to ReadyWhen over the first 6 months

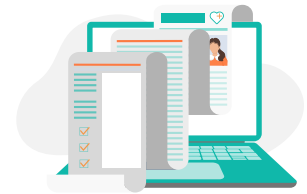
Average of 23%

Growth in clients MoM



Number of documents exchanged in first 6 months:

1,790



*As of June 2022

Conclusion:

The Portal has helped Grant Sauer Notary keep up with today's digital world and increase efficiency and security. "ReadyWhen has become an asset at our office," Bergen said. "Having intake forms, document upload, and instant messaging in one platform has simplified our client contact and allowed us to keep track of correspondence all in one secure place".

ReadyWhen and Grant Sauer Notary meet regularly to discuss product feedback and potential improvements. Additionally, ReadyWhen provides quick and reliable technical support for Grant Sauer and their clients. As Bergen put it "We have been really pleased by the support team's responsive and caring nature and look forward to continuing our partnership".

To learn more about **The Portal**, please contact sales@readywhen.ca