

# EXIT Realty streamlines charitable initiatives with SignWell

## CUSTOMER STORY

With Susan Harrison

Chief Information Officer at EXIT Realty



CUSTOMER STORY

ORGANIZATIONAL SITUATION:

BENEFITS:

### COUNTRY OR REGION:

Canada and the United States

### INDUSTRY:

Real Estate Franchising

### CUSTOMER PROFILE:

EXIT Realty Corp. International is a privately owned real estate franchisor founded in Toronto, Canada, in 1996. The company has expanded across the U.S. and Canada with a unique business model, a long-tenured executive team, and a people-first approach. EXIT Realty operates under the philosophy of "helping people live their why."

### ORGANIZATIONAL SITUATION:

A cornerstone of EXIT Realty's mission is the Spirit of EXIT Charitable Program, which applies a portion of every transaction fee received by EXIT's Head Office to a charitable fund. Associates can raise money for local, approved registered charities and apply to have their contributions matched, amplifying their impact. However, the program's success was hindered by outdated, paper-based workflows for managing permissions, content releases, and approvals, which created delays and inefficiencies.

### SOLUTION:

EXIT Realty implemented SignWell to help streamline its administrative processes. SignWell's features, including template links and dynamic data capabilities, enabled the company to automate and enhance tracking, eliminate manual bottlenecks, and scale its charitable initiatives. Unlike other platforms that charge additional fees for automation features, SignWell offers a comprehensive feature set without hidden costs, making it an ideal choice.

OVERVIEW

## ORGANIZATIONAL SITUATION

EXIT Realty's mission is empowering people to "live their why" through real estate. This philosophy extends to the Spirit of EXIT Charitable Program, which applies a portion of every transaction fee received by EXIT's Head Office to a charitable fund. Associates can raise money for local, approved registered charities and apply to have those funds matched, amplifying their contributions.

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The program represents EXIT Realty's commitment to giving back, with associates championing causes like cancer research, autism awareness, and local community initiatives. However, the administrative process of managing photo releases, quote permissions, and other forms had become a significant pain point.

Relying on printed PDFs, manual signatures, and scanned returns, EXIT Realty faced delays and inefficiencies that slowed down its ability to approve initiatives and distribute funds. Managing multiple initiatives simultaneously created additional complexity, increasing the risk of errors and straining administrative resources.

**"Our associates work tirelessly for charities that matter to them, and we're proud to support their efforts,"** said Susan Harrison, Chief Information Officer. **"But the inefficiency of our old system slowed everything down. We needed a better way to expedite the process to support them faster and better."**

Harrison, a 25-year veteran of EXIT Realty, led the search for an e-signature solution that could align with the company's mission while addressing these operational challenges.

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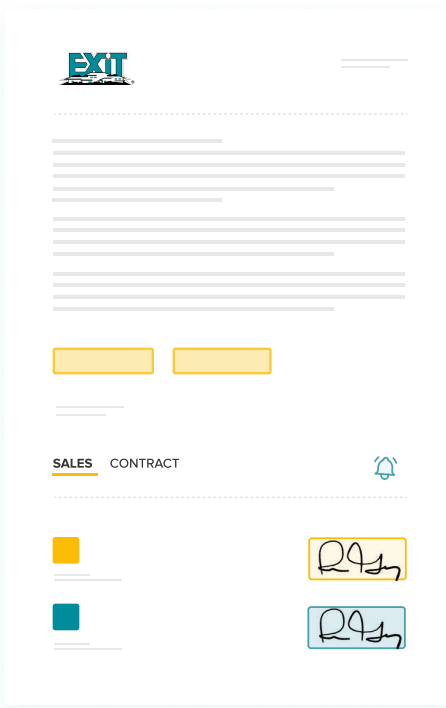
**Susan Harrison**  
Chief Information Officer at  
EXIT Realty

## SOLUTION

Harrison and her team evaluated several e-signature platforms, including DocuSign and Dotloop. While these platforms are widely recognized in the real estate industry, they had limitations that made them less suitable for EXIT Realty's needs.

- »»» DocuSign: Offers features like "PowerForms" for anonymous signing, but these require additional fees and are not included in all plans. The platform's envelope-based pricing model also posed a challenge, with escalating costs for managing multiple initiatives.
- »»» Another popular platform, Dotloop, is widely used by EXIT Associates to manage their real estate transactions, but it wasn't the right solution for this particular need.

SignWell provided EXIT Realty with the tools to simplify processes and improve efficiency without incurring additional costs for automation features.



## KEY DIFFERENTIATORS

### TEMPLATE LINK FUNCTIONALITY

Template links allowed EXIT Realty to create reusable documents with unique URLs, enabling anonymous signing. This was particularly valuable for contributors, such as photographers or charity representatives, who often needed to connect directly to associates. Unlike other platforms that charge additional fees for automation features like these, SignWell included template links as part of its comprehensive offering without hidden costs.

Harrison explained, "**Template links were transformative for us. We could share documents effortlessly and know we weren't charged extra for critical features like these.**"

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## TRACKING CAPABILITIES

SignWell allowed EXIT Realty to enhance their tracking process by assigning unique identifiers to documents. This ensured every form was properly categorized and tied to the correct fundraising initiative.

**"The ability to track documents and know they were tied to the correct initiative was a game-changer,"** Harrison noted. **"It gave us the clarity and precision we needed to manage many campaigns simultaneously."**

## FLEXIBLE PRICING

Unlike platforms that charge per envelope or transaction, SignWell's unlimited document usage provided cost certainty. This was especially important given the volume of initiatives EXIT Realty handles.

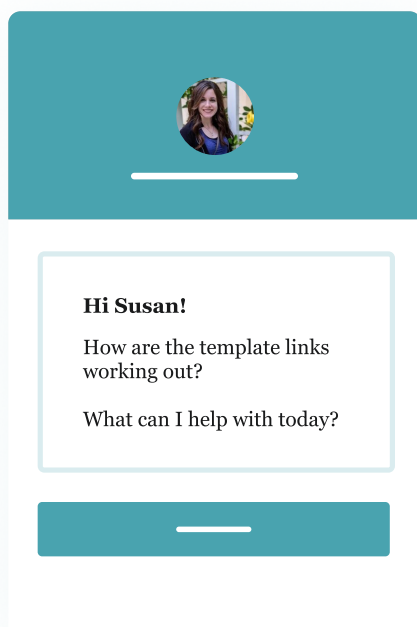
## SUPPORT AND ONBOARDING

Harrison highlighted the personalized support provided by Lora from SignWell, who guided EXIT Realty through the onboarding process.

**"Lora made herself available for every question and made the entire process seamless. The level of support we received was above and beyond,"** said Harrison.

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## BENEFITS

SignWell transformed EXIT Realty's document workflows, significantly improving efficiency and effectiveness.

With template links and dynamic data capabilities, EXIT Realty enhanced how they managed its Spirit of EXIT Charitable Program. These features enabled the team to share and track documents with ease. Unique identifiers, embedded into forms using dynamic data, ensured each document was automatically organized and tied to its respective campaign, reducing delays and eliminating errors.

**"The unique identifiers we implemented using SignWell's template links were a lifesaver,"** Harrison explained. **"They allowed us to track every form and ensure it was tied to the correct initiative. That level of clarity was something we'd never had before."**

It wasn't just the tool—it was the people behind it. Knowing we had someone we could reach out to with any question made all the difference."

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The streamlined document-sharing process through template links reduced bottlenecks, allowing agents to send forms directly to stakeholders, regardless of whether they had prior contact information for the signer. This saved time and made the signing process more accessible and seamless.

The onboarding support also proved invaluable. Harrison noted that the personalized approach made the learning curve manageable and set EXIT Realty up for success.

**"It wasn't just the tool—it was the people behind it. Knowing we had someone we could reach out to with any question made all the difference,"** Harrison remarked.

These improvements extended beyond the charitable program. Marketing teams also began using SignWell to streamline photo and story release forms.

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## RESULTS AND OUTLOOK

EXIT Realty's adoption of SignWell has been a resounding success. The Spirit of EXIT Charitable Program now operates much more efficiently, and faster approvals and fund distributions ensure a more significant impact on local communities.

Susan Harrison underscored the importance of relationships in real estate, extending this philosophy to EXIT Realty's collaboration with SignWell: **"Real estate is all about relationships. The partnership we've built with SignWell reflects that. Their support and commitment to our success have been extraordinary, and this relationship will continue to grow."**

Looking ahead, EXIT Realty plans to expand SignWell's use across more departments. From managing trainer contracts to simplifying marketing releases, the platform's versatility ensures it will remain a vital tool for the company.

**"SignWell has enabled us to focus on what truly matters—our people and their communities,"** Harrison concluded. **"It's not just about saving time; it's about making a difference. And that's exactly what we're doing with SignWell."**

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For more information  
call or visit:

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