



THE AGENT SITE
CONVEYANCING WITH THE BRAKES OFF



Company
The Agent Site



Founded
2020



Checkboard services
Proof of funds check
AML checks
API integration



Result
+12% conversion rate
+56% revenue

The Agent Site helps conveyancers get their clients legally ready by performing AML and source of funds checks for homebuyers, and passing audit-ready reports on to solicitors to make the process fast, seamless, and stress-free.

How fast checks and seamless integrations helped The Agent Site grow by 56%

The challenge

Slow manual checks across multiple platforms were making it harder for conveyancing firm The Agent Site to get clients legally ready in the required timeframe. This was creating more admin for its staff, hurting the client experience, and hindering the firm's ability to scale.

That meant:

- Staff were performing checks across two disconnected platforms from two different providers: one for AML checks, and one for proof of funds. This meant they had to painstakingly link checks to client accounts, slowing time to completion.
- Because solicitors often require clients to be legally ready in a matter of days, The Agent Site staff had to spend long hours performing manual data entry to tight deadlines, creating a serious burden for the team.
- Each end-client had to download two different apps to perform the required checks, slowing matters down, lowering completion rates, and adding to the burden of home buying.

The solution

That’s where Checkboard came in. Unlike some other solutions, which specialise only in one or two areas of onboarding, Checkboard helps firms take control of the entire compliance process. It can perform both AML and proof of funds checks, as well as ongoing monitoring and payments on a single secure platform.

However, for The Agent Site, it wasn’t just the ability to perform those checks, but Checkboard’s simple, easy-to-use APIs that truly made it a game changer.

APIs have allowed The Agent Site to seamlessly integrate Checkboard with its existing systems, reducing friction during the adoption process. This has enabled it to perform all its checks on a single platform, then quickly deliver accurate reports to its solicitors, significantly boosting speed and efficiency.



Clients only need to download one app, do one check, and the results just come straight back into the portal, so the solicitor gets the results they need to get the legal work started. It got the legal work off to a flying start instead of a lumbering pace.

– Fiona Drummond, Founder & CEO



The results

The Agent Site used open banking and API integrations to seamlessly link AML and source of funds data to client accounts, and pass it directly to solicitors. It is streamlined and scalable.

By making much of that process fast and automated, The Agent Site’s sales team can spend less time on admin and more time converting new business.

It has also made a huge improvement to the client journey. Instead of teaching each customer to use two separate systems, they now only need to use one. This has reduced friction and increased completion times.

Want to learn more? [Get in touch with Checkboard](#) —>