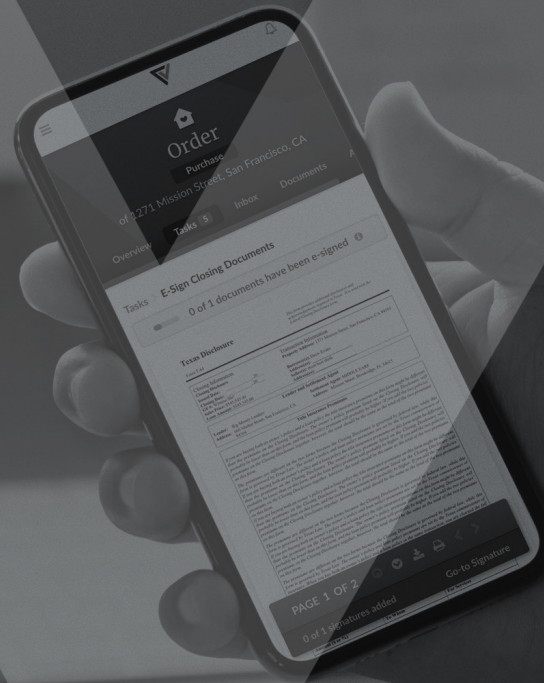




CASE STUDY

Patten Title



INDUSTRY

Title services

FOUNDED

2000

HEADQUARTERS

Houston, Texas

WEBSITE

pattentitle.com

ABOUT

Patten Title has 6 offices across the state of Texas and conducts both commercial and residential transactions.

How Patten Title Used Qualia University to Eliminate 400 Work Hours Per Month

Patten Title is a Texas boutique title company. With offices in Dallas, Austin, and Houston, Patten Title closes about 500 transactions each month. Patten Title was founded as Patten Law Firm in 2000 by Ashley Patten. After many years of successful operation as one of the largest Fee Attorney offices in Texas, Patten Law Firm converted to a title agency. During this transition, the Patten Title team knew that they needed a software solution that would bolster their business as a young and cutting edge title company.

“The basis of our business is to communicate with all parties in the transaction. The key tool is our transaction management product.”

Tiffany Stillwell, VP of Marketing at Patten Title

Ready to see a demo of Qualia? Contact us at qualia.com/demo



DAVID ADAIR
VP OF OPERATIONS
PATTEN TITLE

I was looking for the fastest and most efficient way we could close files while giving a high level of service. I found this functionality in Qualia.

Challenge

All companies face the challenge of training their employees and aligning teams. As companies move into new routines after working remotely, this issue becomes top of mind. Brian Adair, VP of Operations at Patten Title, shared that one of his goals when moving to a new software included training his teams. With multiple offices across the state, Brian wanted to ensure that all teams at Patten Title were aligned and were providing an equally-high level of service to their clients.

Solution

Qualia University provided the tools the Patten Title team needed to educate and empower their employees. Through this platform, the Patten Title team was able to easily learn how to use all of the features Qualia had to offer. With an easy-to-access platform, coupled with self-paced courses, Qualia University makes employee training a comprehensive, interactive, and enjoyable experience.

"We have incoming team members utilize Qualia University for any area they will be working in. It provides a solid base training across the board so that we know all incoming employees have the same base knowledge of the software and how it can save time through functionality."

Brian Adair, VP of Operations at Patten Title

Through Qualia University, the Dynamic Workflows, tasks, and notes features were both simple to learn and empowered the team to make drastic efficiency gains. After quickly learning how to use these features, the Patten Title team was able to align their practices across their six offices and increase processing speed by eliminating almost an hour of work per file. This enabled the Patten Title team to take on more orders without needing to increase the size of their staff.

Dynamic Workflows and Tasks

Dynamic Workflows make it possible to tailor and automate tasks and workloads to specific contacts, teams, and transaction types. Brian and his team learned how to set up Dynamic Workflows through Qualia University and were able to easily set this up for their teams. Once this had occurred, their teams were able to easily complete tasks and clearly see what was needed for each file. This simplified training employees because they were able to work through a file one step at a time, and learn exactly what was needed to accomplish their tasks.

Before the automated Dynamic Workflows were in place, different teams would accomplish tasks through their own processes, making it a challenge for teammates from different offices to work together. In March and April of 2020, because each team's practices were aligned, when the Patten Title team experienced a 47% increase in order volume, they



were able to close approximately 1,600 monthly transactions without increasing their headcount.

"In the past, each team would do it a little bit differently, but with the ability to sit down with each team and create a custom workflow, everyone knows exactly what tasks they are responsible for on each file. When you do this, you create a comfort level for the employees so they know exactly what to do and when the file is ready to go to the next person in the process. This makes it easier to bring a new team member on because they can easily see what is expected of them."

Brian Adair, VP of Operations at Patten Title

Notes

The notes feature is also an incredibly valuable tool included in the Qualia Platform. Patten Title team members are able to leave a note in any section of the order for other team members to see. Team members can even tag their colleagues if the note requires their attention. This ensures that employees are able to collaborate with one another from anywhere, whether they are working in the office or working remotely.

"There is so much value in every team member being able to see what is going on in a file. There are so many built-in functions that allow the team to communicate, see what has been done, and assign tasks to others if needed."

Brian Adair, VP of Operations at Patten Title

All-in-one Software Experience

With their previous software, the Patten Title team would have to have access and learn multiple outside platforms, such as shipping platforms, underwriter websites, and tax certifications, to accomplish their tasks for each file. With Qualia, all Texas specific forms,

like T-64 and Insured Closing Letters, are supported. From issuing title insurance through their Texas underwriter partners to printing shipping information through the FedEx integration, everything can be done without having to leave the Qualia Platform. Qualia University provides training for these integrations and makes it easier for employees to quickly learn how to accomplish those tasks. Furthermore, by staying within one platform, employees are able to minimize the re-entry of data and the risk of human error. Because everything occurs within one platform and data has to be only entered once, the Patten Title team is able to save up to 45 minutes per file.

"The efficiency that Qualia provides, from the FedEx integration to being able to order tax certificates without having to go into a separate system and re-enter data, has been significant for us to be able to be efficient and provide the best customer service to our clients."

Tiffany Stillwell, VP of Marketing at Patten Title

Results

Through Qualia, the Patten Title team has been able to train employees with ease through Qualia University, align practices between their offices, and increase their order volume with their existing team. Because of the efficiency gains made by their teams using Qualia, the Patten Title team saved up to 400 work hours per week in the months of March and April.

"We came from a system that wasn't as user friendly. Anytime you make a change, people have to get used to the new normal and everyone that is currently using Qualia is very adamant that this is the best software they have ever worked in."

Brian Adair, VP of Operations at Patten Title