

# Building for the Future: Dalton & Finegold's Journey with Qualia and the Promise of AI



**Company Name:** [Dalton & Finegold](#)

**Company Type:** Law Firm

**HQ:** Andover, Massachusetts

**Products:** Core, Connect, Shield,  
Marketplace

## Results

- Processed refinance files in as little as **48 hours**
- Successfully managed **3x volume increase**, without significant staff additions
- Achieved **paperless operations** in 3 months

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## About

Founded in 2000, [Dalton & Finegold](#) is a full-service civil law firm with deep roots in the real estate closing industry. The firm offers services for residential and commercial real estate, estate planning, and corporate law. With multiple office locations, they are recognized as a trusted partner dedicated to helping their clients navigate the complexities of real estate transactions while exceeding client expectations.

In 2015, Dalton & Finegold chose Qualia as their technology partner in order to strengthen its operations and grow its business. The firm's success has been significantly shaped by a long-standing partnership with Qualia. This early partnership, combined with the company's later adoption of Qualia's artificial intelligence (AI) capabilities, transformed Dalton & Finegold's operational processes and contributed to unparalleled client experiences.

## Challenge

### Over-Reliance on Paper and Manual Processes

In 2015, the firm was heavily dependent on physical files, leading to inefficiencies and making remote work nearly impossible. "Paper was the number one pain point," stated Anne Webster, Chief Operating Officer. This manual approach meant only one person could work on a file at a time, slowing down operations and increasing staffing costs. The firm desperately needed to modernize their workflows and move away from manual processes.

## Disconnected Systems and Communication Bottlenecks

Operations were fragmented across multiple software programs for different tasks, like 1099s, document storage, and check generation. "Using our previous software, E-Closing, we weren't able to track files or easily understand what's happening in the business," said Barry Finegold, Managing Partner. A lack of a unified system slowed internal and external communication, making it difficult to respond quickly to client inquiries.

## Reporting Challenges and an Outdated User Experience

The firm struggled with a lack of clear visibility into key business metrics, such as profitability per file or top referral sources. This made it difficult to make data-driven decisions, forecast revenue projections, or cultivate stronger relationships with referral partners. Furthermore, their previous software was complicated to understand, making training new employees, especially those new to the title & escrow industry, a time-consuming challenge.

## Solution

Dalton and Finegold was one of Qualia's earliest customers, which not only allowed them to address their pain points head on, but also gave them a significant competitive advantage. This wasn't just a software purchase; it was the start of a collaborative partnership.

## Unified Platform Automates Workflows

Qualia's intuitive, cloud-based system consolidated all of their operations onto one platform. "Qualia allowed us to become paperless in about three months because of the workflow we were able to build," said Webster. This enabled real-time collaboration on files, standardized communication, and remote work, all of which improved efficiency.



Within 48 hours of starting a refinance file, we had the payoff. The title was in and cleared. The commitment was drafted, and we were sending it to the lender, ready to go. The lender was shocked. We could only do it because of Qualia.

Christina Petrucci  
Partner, Dalton & Finegold

## Automation & Artificial Intelligence (AI) Boost Productivity

"Qualia automates a lot of our manual processes so our paralegals and escrow people don't have to be here from 7 in the morning until midnight. I think AI is super important for our future, and it's going to make our team's life a lot easier," said Finegold.

Key features—like **Dynamic Workflows** and the **AI Document Processor**—automated previously manual tasks. Christina Petrucci, Partner, highlighted, "AI is really cutting down on manual data entry. Qualia allows us to do things quicker, faster, and more efficiently." This freed up staff to focus on higher-value client interactions.

## Enhanced Security and Client Experience

Qualia Connect provides a secure portal for client communication and document exchange, crucial for combating wire fraud. "Keeping all messages, documents, and closing tasks within Connect has been huge for the client. They know that they're operating in a safe and secure environment," noted Webster.

Features in Qualia Shield, like **Public Records Checks**, further bolstered their fraud prevention efforts. Webster noted, "We experienced the typical vacant lot scam attempt, but we were able to catch it through the Public Records Checks feature, which has been fantastic. It checks how long a person's email address has been active and how long they've been associated with a physical address."

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Without Qualia, we could have potentially been caught by a fraudster and wired out incorrect money. If nothing else, you must have Qualia.

Anne Webster

Chief Operating Officer, Dalton & Finegold

"By not having to spend so much time doing manual data entry, we could spend more time with the clients," said Webster. "AI has allowed us to put that technology to work so we can focus on delivering outstanding service. Because of AI and automations, processing files is much easier, which allows us to be closer to the customer. Ultimately, AI is a good thing because it allows us to spend more time with people."

"Having automated responses through the **AI Messaging Assistant** [in Qualia Connect] allows someone to just hop onto any file and quickly answer the question the client's asking," elaborated Petrucci.

## Results

"Working with Qualia is a partnership. It is not a client-vendor relationship," said Petrucci. "You should partner with a platform that is going to always have their finger on the pulse of what's happening in the technology world."

Through its partnership with Qualia and use of AI, Dalton & Finegold revolutionized its operations. The firm successfully handled a tripling of volume during the early 2020s refinance boom without significant staff increases, attributing this to Qualia's automations and collaborative partnership: "It's been a great ride. I'm very excited about what's been built, and just excited about the future," said Finegold.