

How Fortis Title Automates Operations and Reduces Turnaround Time by 98% with Qualia Connect



Company Name: [Fortis Title & Escrow, LLC](#)

Company Type: Title & Escrow

HQ: Virginia

Products: Core, Connect, Shield,

Marketplace

Results

- **98% reduction** in time to gather seller information and signed authorizations
- Reduced turnaround time for information requests from 7-10 days to **under 10 minutes**
- Expanded from one employee to 15 employees and into three states within three years

About

Fortis Title & Escrow, headquartered in Virginia Beach, Virginia, was founded three and a half years ago with a goal of bringing technology-driven efficiency to the real estate closing process. The company has expanded from a single employee to a team of more than 15, and now operates in Virginia, Florida, and Ohio. A key part of the company's mission is to combine the latest technology with personal communication and customer service, aiming to eliminate human error while continuing to grow on a national level.

Challenge

A Lack of Automation Required Manual Follow-Up

Before Qualia, Fortis Title used a different software system that lacked automation and placed the burden of manual follow-up on its team. The system did not send messages or follow up on behalf of the user, requiring constant hands-on effort. This was especially problematic when trying to obtain critical, time-sensitive information from sellers, said Olivia Lee, Fortis' Vice President of Operations.

"In my experience using SoftPro, there would be sometimes days or even weeks of constant follow up with a seller trying to get payoff or personal information," said Lee, who was personally responsible for managing 150 to 175 files at a time.

Labor-Intensive Processes Made it Difficult to Provide Timely Service

The extensive, manual closing processes were prone to error and caused frustration, as team members struggled to track which files required immediate follow-up. Any delay could lead to real estate agents becoming upset. Explained Lee, "When you manage many files simultaneously, it's hard to remember everything and provide the best possible service. You don't want real estate agents being upset and asking 'Why am I just now learning about this?' when you forget to follow up with them."

For Lee and her team, the process was exhausting: "In the old way of doing things, I just remember having to track down information from customers all the time, and I was constantly frustrated. I could only do so much for one person."



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Olivia Lee
Vice President of Operations

Solution

Increased Productivity Through Automation

From the very beginning, the team at Fortis Title wanted a solution that would significantly reduce manual workflows and automate communication. The company implemented both Qualia Core and Qualia Connect, with Connect being the key factor that drove their buying decision. "There was no way we were moving forward and purchasing Core without Connect. I wanted Connect because I believed its automations were going to be the game changer for us," Lee said.

Fortis Title now uses Smart Action automations for a wide variety of critical, repetitive tasks. Documents like ALTA statements and HUDs are automatically sent to all parties once an uploaded document is saved with a particular naming convention. This eliminates the need for agents to manually request documents and reduces the volume of inbound requests. The Fortis Title team also set up automations to notify parties as soon as a wire has been sent, ensuring that everyone remains informed.

Delivering a Modern, Differentiated Closing Experience

Smart Action automations have allowed Fortis Title to stay true to its mission of providing a customized, personal experience. Lee and her team have also found that these automations benefit real estate agents' transaction coordinators, who now rely on the platform to manage requests on behalf of their agents. "Their transaction coordinators love it," Lee said.

The company is also excited about Qualia Texting, which Lee believes will further increase efficiency and client engagement, as many people do not check their emails regularly and often mistake legitimate messages for spam. While email has an average open rate between 20-40%, text messages have an incredible 98% open rate. The Fortis Title team plans to incorporate Qualia Texting into their contact strategy, and use SMS notifications instead of email for non-confidential, order-related messages.

"I am very much looking forward to sending our clients invitations to access our secure platform via a text message. Even more so, I'm excited that text message history will be available within Qualia Core and associated with an order, instead of on my personal cell phone," Lee added. "Qualia Texting will eliminate a lot of manual work screenshotting and uploading information from personal cell phones into the platform."

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Results

The decision to adopt Qualia Connect has resulted in significant time savings for the Fortis team and a faster closing process for their clients. For example, Lee shared that before Qualia, the typical turnaround time for gathering payoff information from sellers was 7 to 10 days, with a minimum of two business days for the most responsive clients.

"Utilizing Connect, we've significantly reduced the time it takes to collect payoff information, including the time it takes for the seller to complete their personal info and authorize the payoff," Lee said. "Thanks to automated information requests, we went from worst case 10 days to a total of **under 10 minutes** to get all the payoff information we needed taken care of."