

CASE STUDY

Hankin & Pack

How Hankin & Pack Leveraged the Qualia API to Manage Fluctuating Order Volume

OVERVIEW

Hankin & Pack is a real estate law firm based in Charlotte, North Carolina. Their company's mission is to "innovate the stress out of closings." With that mission in mind, Hankin & Pack is constantly looking for ways to deliver a more optimal client experience. As part of these efforts, the Hankin & Pack team identified a goal of evaluating and improving their internal operations. These improvements would empower their team to be better prepared for future market cycles and fluctuating volume.

CHALLENGE

Hankin & Pack's Chief Operating Officer, Josh Roberts, said that many of their clients have a wide range of closings they need each month—from "200 homes one month to 20 homes the next." To successfully manage this fluctuating order volume, Hankin & Pack needed to improve their internal operations to stay organized, track employee bandwidth, and quickly see executive-level reporting metrics.

HP HANKINPACK

INDUSTRY

Title & Escrow

HEADQUARTERS

Charlotte, North Carolina

WEBSITE

Hankinpacklaw.com

SUCCESS

Consolidated technology stack:

Leveraged the Qualia API to integrate multiple systems

Greater internal efficiency: Reduced workloads by 50% for specific tasks

Built executive-level reporting:

Created an automated reporting dashboard that updates every 5 minutes



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Unconnected systems led to significant manual work and frustrated employees

Hankin & Pack used a variety of technological point solutions during transactions. This setup meant that employees had to log into multiple systems and fill out spreadsheets manually as they completed tasks.

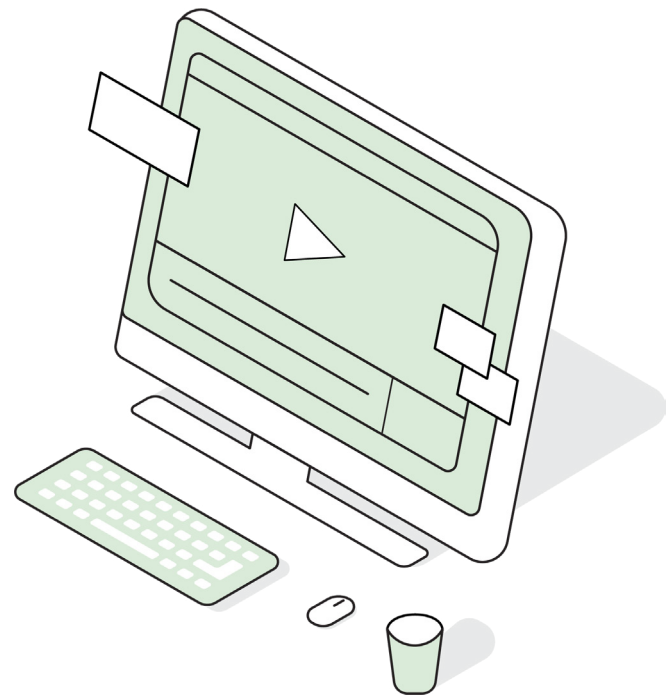
Jordan Edgerton, Head of Acquisitions at Hankin & Pack, said their employees used to track task status with a Google spreadsheet. When ordering HOAs, for example, employees “would order the HOA, go to their spreadsheet, manually change a cell from red to yellow to signify that they ordered it, and then after receiving the HOA, they would go back to the spreadsheet and change that cell from yellow to green.”

Since their various tools did not communicate with each other or their team’s Google spreadsheet, employees would constantly have to rekey information. This process was inefficient and led to errors during closings if employees filled out the spreadsheet incorrectly.

Manual reporting made it difficult to see comprehensive business performance

Along with workflow efficiency, Hankin & Pack wanted detailed, executive-level reporting that gave them visibility into order activity for each client. Unfortunately, their siloed systems meant that Hankin & Pack’s reporting capabilities were limited.

A lack of consistent reporting made it difficult for them to assess their current business performance. It also made it difficult to track trends in order volume and identify areas that needed their attention. Hankin & Pack needed to find a reporting solution that would give them a comprehensive overview of their current state of business.



Difficulty identifying and implementing workflow optimizations

Since Hankin & Pack had a hard time seeing a big-picture view of how their business was performing, it was also challenging to identify ways to improve their workflows. Nick Dooley, Head of Product and IT at Hankin & Pack, said, "if we're going to innovate the stress out of closings, we need to reduce stress points for our clients." One stress point for their clients, in particular, was being caused by their internal workflows.

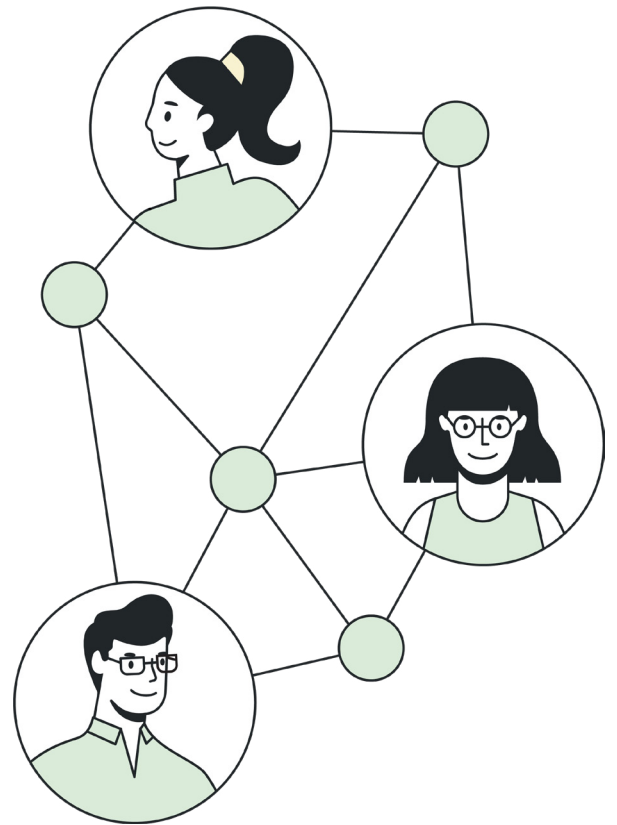
Workflow limitations, such as manual tasks and a lack of integrations, led to overcomplicated processes. Roberts added that "[workflows] were either over-engineered, or we had solutions that could handle 500 closings. You could handle 700 closings, but then it became so cumbersome and manual that it just didn't make sense for the volume."

This challenge meant that when their team received a sudden influx of orders, their workflows would break down and employees would need to use manual tasks to create workarounds for their processes. This is an issue the team at Qualia has identified in many complex organizations, and defined as "workflow debt."

Not only did inefficient workflows make closings more stressful for their employees during periods of high volume, but it ultimately resulted in making their client experience less consistent.

"Now, our reporting sheet is pulling data from Qualia every 5 minutes based on tasking. And if I click a task in Qualia, the sheet changes itself. So we have that big picture overview of all of our tasks."

— Jordan Edgerton, Head of Acquisitions at Hankin & Pack



SOLUTION

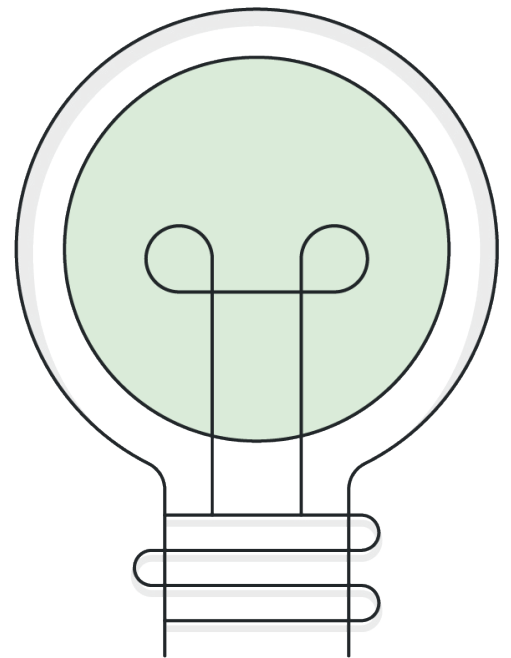
Hankin & Pack leveraged capabilities in Qualia, particularly the Qualia API, to create a better system for managing orders. Roberts explained that as they were implementing the API, their team “went back to the drawing board” to ask themselves, “why are we doing things this way? Does it make sense to keep doing it this way? And if not, how can we do it better?” These conversations resulted in 3 main opportunities for improvement:

1. Gain a comprehensive view of business performance with a real-time reporting dashboard
2. Reduce the number of tools their employees need to execute closings
3. Create flexible workflows that enable their team to pivot quickly based on business performance and market conditions

Hankin & Pack consolidated their operations onto one platform

Hankin & Pack worked with Qualia to audit their previous operational setup and identify opportunities for improvement. During this process, Hankin & Pack consolidated their workflows onto a single platform. Doing so benefited employees in 3 major ways: simpler onboarding, more straightforward workflows, and fewer errors from rekeying data.

Ultimately, these improvements reduced workloads by 50% for over 100 employees.





“While Qualia is an upfront investment, it gives us the ability to know where we’re at because we have the visibility we need, and we’re having to do less manual work to provide that visibility.”

— Nick Dooley, Head of Product and IT at Hankin & Pack

Executive-level reporting quickly gives leaders a snapshot of the current state of business and opportunities

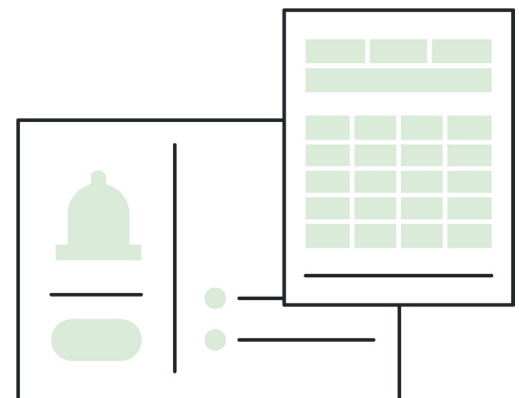
With custom reporting in Qualia, Hankin & Pack can now see a comprehensive view of business performance. These expanded reporting capabilities enable Hankin & Pack to provide executives and operators with real-time data to inform the decision-making process.

Edgerton said that this modern reporting system that eliminated their information silos helped his team stay on top of tasks during closings. He said that “instead of filtering through every one of our team members’ overdue tasks, managers can easily see potential delays and nip them in the bud.”

Edgerton added that the Qualia API minimized the need to update reporting dashboards manually and helped them see additional opportunities to scale their business. “Now, our reporting sheet is pulling data from Qualia every 5 minutes based on tasking. And if I click a task in Qualia, the sheet changes itself. So we have that big picture overview of all of our tasks.”

Modern systems create a culture of constant improvement

With the efficiency gains and reporting insights in Qualia, Hankin & Pack can quickly identify areas for improvement and optimize their operations accordingly. It also gives them



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a centralized location for all client interactions, allowing for better transparency and consistency.

Dooley said that “while Qualia is an upfront investment, it gives us the ability to know where we’re at because we have the visibility we need, and we’re having to do less manual work to provide that visibility.”

This additional visibility empowers Hankin & Pack to use real-time data to manage their internal operations and make informed decisions to grow their business. By continuously refining their processes and adapting to market conditions, Hankin & Pack stays ahead of the curve and delivers stress-free closings to their clients.

RESULTS

With the Qualia API, Hankin & Pack increased the efficiency of their internal operations. Hankin & Pack said that the time and energy they put into reworking their operations and implementing new technologies has resulted in simpler, more modern processes that can change and grow over time.

Their team encouraged businesses going through similar challenges to make a strategic plan for implementing new technology (such as the Qualia API). When implementing changes—especially to workflows—their team said leaders should map out all the steps of a new workflow. That’s part of the Qualia Workflow Framework. This due diligence enables businesses to identify and remove bottlenecks that can slow down processes.

Lastly, they encouraged businesses to evaluate all aspects of their internal operations instead of relying entirely on a particular technology. Doing so creates a culture of continuous improvement that empowers teams to address the underlying infrastructure and build data-driven title operations.

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