

CASE STUDY

Orchard

Orchard Title Engages Qualia's Professional Services Team to Power Rapid Expansion

OVERVIEW

Orchard is an online real estate platform with a mission to deliver the most stress-free, fair, and simple way to buy and sell homes. Orchard offers consumers an end-to-end home purchase experience that enables them to search for a home online and continue their digital experience all the way through closing. For buyers with an existing house to sell, Orchard can also help them unlock equity and move right away into a new home before selling their previous residence.

Orchard Title, who had been a Qualia customer for more than two years, engaged Qualia's Professional Service Team to help them more quickly gain comprehensive knowledge of the new regions they were entering and build a scalable workflow model that would enable consistent operations across new and existing markets.

Orchard

INDUSTRY

PropTech

HEADQUARTERS

New York, New York

WEBSITE

Orchard.com

SUCCESS

3 new markets: New processes led to accelerated expansion

60% fewer workflows: Base workflow and smart tasking eliminated extra work

Advanced capabilities: New processes will be used for future growth



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THE CHALLENGE: Orchard Title Needed a Consistent Methodology and Scalable Workflow Setup to Expand Rapidly to New Markets

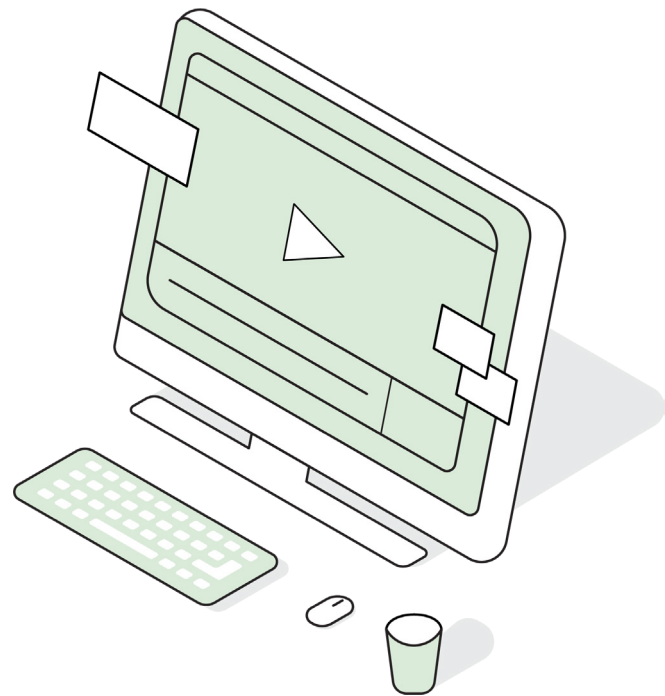
Orchard, which, as of this case study, was available in 13 markets throughout the US, was looking to expand rapidly. Title operations can vary on a state-by-state and even city-by-city basis, so it's important to be thoughtful about expansion to new cities. Orchard needed a consistent methodology to gather information about new markets and also needed a workflow model that would enable them to scale their operations more quickly.

Gathering information about new markets was time consuming

The Orchard Title team was industrious when it came to gathering knowledge about new markets they were planning to enter. The team worked together by tapping into their various professional networks and investigating available resources to gather information about the customs and regulations dictating transactions in new markets of interest. Though this process was thorough, it was also tedious and inevitably led to discrepancies in the amount and quality of information they were able to gather from market to market. The team needed a consistent methodology to gather exhaustive and comprehensive information about new regions so that they could build their workflows effectively and with the right tasks in place.

Adding new market workflows was less scalable

Orchard had successfully configured workflows in Qualia Core in several existing markets; however, the team lacked a process to quickly scale workflows to new markets. Josh Shih, Director of Business Operations at Orchard, explained that each time the team entered a new market, they would spend a lot of time configuring a new unique workflow. "We wanted to set up a structure where we could avoid doing that by implementing a **base workflow** in Qualia with a Smart Tasking add-on structure," Shih said. "And we wanted a thought partner to help us take those ideas and apply them."



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THE SOLUTION: Orchard Engaged Qualia's Professional Services Team to Establish a Process for Rapid Expansion to New Markets

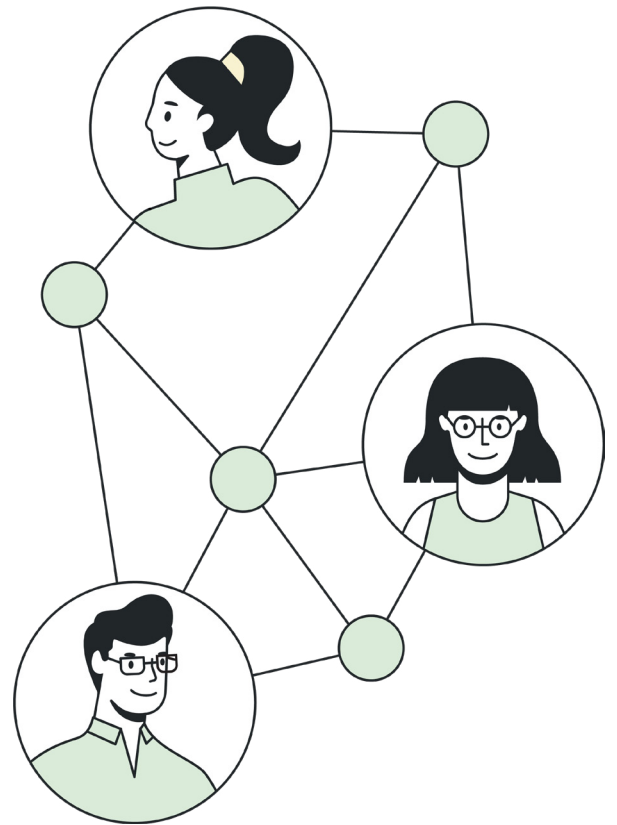
Orchard Title engaged Qualia's Professional Services team in 2021. Qualia's Professional Services team consists of title and escrow experts who together possess decades of experience building fast-growing title operations. The Professional Services team provides expertise ranging from market entry analysis and recommendations, to workflow and process design, to ongoing operational guidance and support.

Orchard Title brought in Qualia's Professional Services team with two primary goals:

1. To gain an **understanding of title operations** in new states in a structured and efficient manner
2. To have a thought partner to help the business streamline expansion operations and assist in **building out a scalable workflow design**

Comprehensive information helps clients understand new markets from all angles

Qualia's Professional Services team possesses a breadth of experience and industry knowledge to provide Orchard with complete and accurate information for any new market of interest. "Qualia's presentation of the [market intelligence] materials with all the information laid out was great and saved us time in having to go look for that ourselves," Shih said. A consistent and comprehensive diligence process helps the Orchard team prepare more quickly to launch in new markets with confidence.



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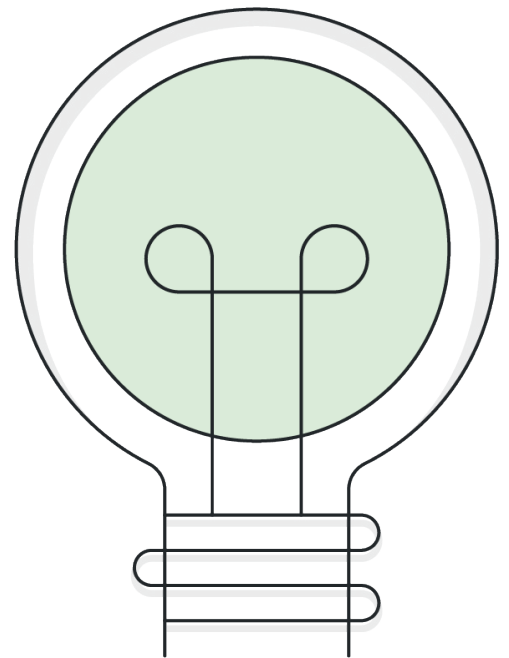
– Josh Shih, Director of Business Operations at Orchard

A powerful workflow setup for Orchard’s unique model accelerated rapid expansion to new markets

Qualia’s Professional Services team dove into Orchard’s existing workflows to fully map them out against various transaction use cases. From there, the team identified similarities and overlaps in the workflows to create a **“base workflow”** that could work across transaction types. The Professional Services team then helped Orchard build out this base workflow and a process to dynamically layer on state-specific transaction requirements through Smart Tasking. “Rather than having everything in one workflow, with a proper set of logic and trigger features, we can correctly pull in Smart Tasks at the right time,” Shih explained. “We can then move quicker to use dynamic Smart Tasks modules rather than rebuilding the workflow [for each new market].”

This new workflow setup not only enabled Orchard to scale to new markets quickly but also ensured Orchard’s differentiated transaction experience could be carried through. “[Through the process] we were seeing new ways to leverage Smart Tasks that we hadn’t thought about before,” Shih said. “This brought fresh ideas to light so that we could continue supporting the team’s execution of our specific transaction types at Orchard.”

Lastly, by collaborating with Qualia’s Professional Services team to design a consolidated set of base workflows, the Orchard Title team could make global changes across workflows more quickly for easier and more efficient maintenance.



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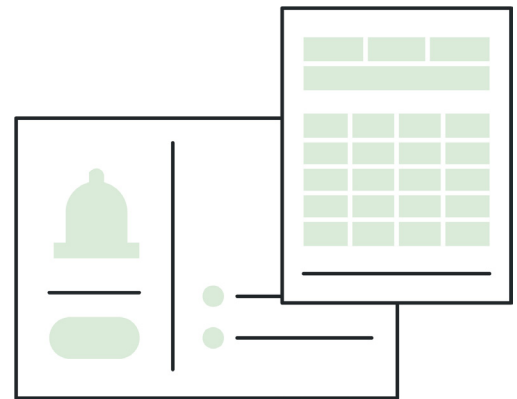
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– *Josh Shih, Director of Business Operations at Orchard*

THE RESULTS: Orchard significantly sped up time-to-market in 3 new regions and reduced their number of workflows by more than 60%

By partnering with Qualia’s Professional Services team, Orchard Title was able to reduce the amount of time spent researching new markets and building workflows. The team scaled to 3 new states and also gathered market knowledge for future market expansion with Qualia. “Rather than spending time on fundamental questions about new markets, we could think about the next tier of requirements and engage in new markets at a deeper level by thinking about how we execute in a better way in the market and improve customer outcomes,” Shih said.

With their new workflow set up, Orchard Title was also able to streamline their operations for greater scalability and efficiency. The team reduced a larger set of individualized workflows down to a small handful of “base workflows” that could be leveraged across all states. With a more consolidated workflow and tasking structure, Orchard could more efficiently grow to new markets.



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Orchard Title also benefited from a collaborative approach that equipped the team with the knowledge to act independently for future expansion. Qualia's Professional Services team walked Orchard Title through the thinking behind the new workflow design so that the Orchard Title team would have the skills and knowledge to effectively leverage base workflows in new markets moving forward. The Professional Services team also helped Orchard uncover features and functionality within Qualia so that the team could "know how to handle situations in the market" using advanced automations available in the system. The Orchard Title team now operates with a more advanced understanding of the Qualia system to work more quickly and with greater nuance as they expand to new markets.

Results

3 new markets

New processes led to accelerated expansion

60% fewer workflows

Base workflow and smart tasking eliminated extra work

Advanced capabilities

New processes will be used for future growth



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