Qualia

Universal Title

UNIVERSAL TITLE

INDUSTRY
Title & Escrow

HEADQUARTERS
McLean, Virginia

WEBSITE
universaltitle.com

SUCCESS

Expanded into new locations: Opened offices in 3 new states and have plans for future growth

Switched to 1 secure closing platform: Consolidated tools to create a simpler closing process and greater workflow efficiency

How Universal Title Scaled Their Business to Grow into New States

OVERVIEW

Universal Title is a family-owned and operated settlement company and title insurance agency based in McLean, Virginia. Their affiliated companies have been conducting real estate settlements in Virginia, Maryland, and the District of Columbia since the late 1970s. In the past few years, they have opened new offices in Washington State and Florida, and in 2023, they will be expanding into Texas. In the mid-2000s, brother-sister duo David K. Mason and Jennifer Mason Halsted took over the daily operations of Universal Title as Chief Executive Officer and President.

Universal Title's goal is to be a strategic partner to their clients. With this goal, they aim to provide elevated service and transparent communication to all closing parties—especially real estate agents, homebuyers, and sellers, their main sources of business.

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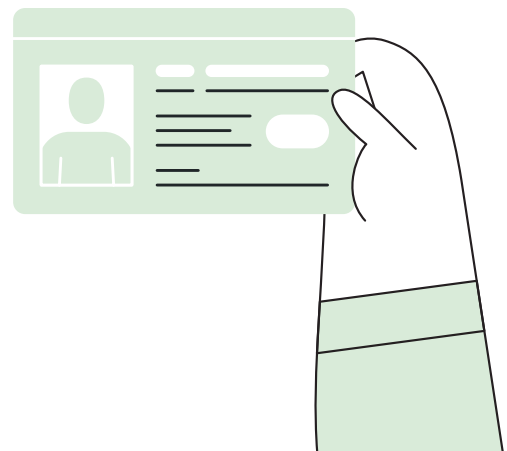
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In 2018, Universal Title's team identified a few key obstacles with their software. Halsted said they asked themselves, "what do we want our business to look like going into the next decade, and how are we best going to achieve that?" With this sentiment in mind, they decided to find a more modern and intuitive software to power their next phase of growth.

One of their biggest challenges was finding a technology platform with a user-friendly customer portal, especially as they were growing and adding new offices. Having more modern software would enable their clients to share information and updates more quickly and securely during the closing process. Unfortunately, as Universal Title grew, their legacy software was holding them back.

Too many tools made it difficult to deliver a consistent client experience

Prior to Qualia, Universal Title had difficulty providing their clients with a consistent transaction experience. Halsted explained that their previous software had "too many points of translation between systems," which made it challenging to deliver simple and secure closings. Clients often voiced frustration when navigating through their legacy software to receive updates and share documents.

When communicating with real estate agents during closings, Universal Title's agents often had to use multiple tools to complete tasks and send closing documents to them. Not only did this open up security risks during transactions, but it also led to errors and miscommunication with other closing parties. Universal Title needed a solution to simplify their closing process to provide a better experience for real estate agents and the end consumer, homebuyers and sellers.

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Complicated workflows made it difficult to create efficient processes

Universal Title's previous workflows involved multiple tools and point systems, which led to disjointed workflows that required employees to switch between tools throughout the day. This workflow setup led to numerous manual tasks, operational workarounds, and delayed closings.

Halsted said that "many of our workflows had such elaborate decision trees that I was having a hard time remembering where something was located if I needed to make a change." This issue is one that the team at Qualia has identified in many complex organizations, and defined as "workflow debt."

Complicated workflows also made it difficult for Universal Title to onboard new employees. During onboarding, employees needed to learn how to use multiple tools and understand how all these tools worked together during closings. This long onboarding process made it difficult to get new employees up to speed and took precious time away from existing employees (who needed to help with onboarding). Since these workflow challenges were impacting their employees' productivity, Universal Title knew they needed to find a solution.

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— Jennifer Mason Halsted, President of Universal Title

SOLUTION

After researching different software options, Universal Title was impressed by Qualia's vision for a connected real estate ecosystem. Halsted shared that during the sales process, "it was exciting to see that Qualia is constantly trying to improve their platform." Universal Title decided to switch to Qualia's cloud-based platform, providing them with a secure, modern, and efficient way to do closings.

Using Qualia Connect to prioritize client communication and security

Universal Title adopted Qualia Connect to improve their client experience. Connect enables all closing parties to communicate in a single, secure platform. Leveraging a single platform—instead of multiple tools—has made it easier for Universal Title's clients to share documents and other sensitive information during closings. It has also helped Universal Title's team decrease their reliance on email, especially when sharing client information.

Switching to a single platform also mitigated security risks during the closing process. The robust security standards implemented throughout the Qualia products, such as ISO 27001, SOC 2 Type II, and maintenance of ALTA Pillar 3 best practices, enable Universal Title to meet security best practices when handling their clients' data. Prioritizing communication and security has enabled Universal Title to deliver a differentiated closing experience for their clients.

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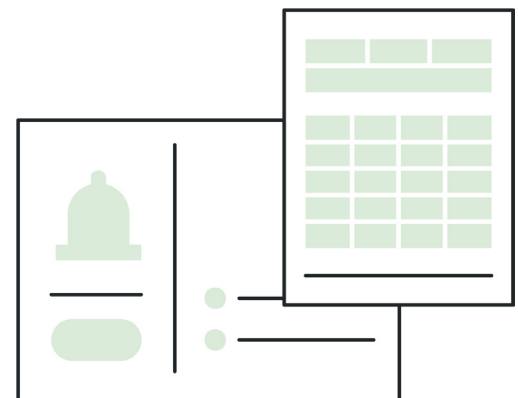
— Jennifer Mason Halsted, President of Universal Title

Implementing workflow improvements created fast, modern processes

As Universal Title transitioned to Qualia, they transformed their workflows to be more effective for their current business goals and client demands. Halsted shared that this process enabled her team to audit and improve their current workflows. "We took this opportunity to take a lot of tasks out of our workflows because we knew some of them weren't necessary. People were doing the tasks, but not necessarily completing them in the workflow, so our task lists were getting out of control."

One specific change was updating personalized documents, which involved moving them to Qualia and retiring older documents. Halsted explained that Qualia's intuitive layout made it simple to migrate these documents and start using them in their Qualia deployment.

Halsted shared that "change is hard for organizations of any size since you're trying to put a lot of people into a new way of doing things. But once people started working [in Qualia], it was so intuitive that the training was not difficult." She explained that having a designated Qualia Customer Success Manager (CSM) during the onboarding was helpful. This additional support allowed employees to ask questions and get additional training as they were learning new processes.

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it's user-friendly and client-friendly, but it also
increased our efficiencies so much."**

— *Jennifer Mason Halsted, President of Universal Title*

RESULTS

Since switching to Qualia, Universal Title has expanded
into new states and has plans for additional growth.
By having software that enabled them to follow their
ambition, Universal Title has been able to focus on building
relationships in these new states to power their business's
growth.

Qualia proved to be more than just title production.
Adopting Qualia as their comprehensive title and closing
system empowered Universal Title to create more efficient
processes. And even further, it helped them better connect
with their partners and improve their client experience.
Halsted said that "the best thing about Qualia is not only
that it's user-friendly and client-friendly, but it also increased
our efficiencies so much."

Updating their workflows to improve internal efficiency has
empowered Universal Title to scale their business while
prioritizing client experience. As Universal Title opened
new offices, Qualia's cloud-based platform enabled them to
quickly stand up new offices and start accepting orders.

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