Qualia

The Title Operator's Guide to Building Powerful Workflows

An Introduction to This Guide

Why your workflows matter

Now, more than ever, operational efficiency and consistency are critical for business health. Well-structured workflows and processes are the lifeblood of a healthy title operation and are therefore a meaningful place for businesses to examine closely for optimization opportunities.

By creating well-defined and repeatable workflows, title companies reap the benefits of a standard operating procedure including:

1. Improved client experience

The workflows you build help to add a level of predictability to your process that can help you communicate service expectations to clients. Properly constructed workflows that are executed across all teams within your organization ensure every task is completed within a particular timeline that's been defined in your workflow—regardless of who is working on the order. This level of predictability enhances client satisfaction through a deeper sense of trust.

2. Greater operational efficiency

A consistent process also creates predictability in the delivery of products and services so you can more easily follow the trail of activities to spot where delays or errors occurred. For example, if you know that "Task A" is completed within a certain timeframe, and that if it is not, "Consequence B" occurs, it is much easier to find where things might have broken down and resolve the issue to create a more efficient process over time.

3. Support for complexity and scalability

Your vision for how a real estate transaction should be delivered is the product of much work and many hands. Business processes and workflows are essential elements of designing your ideal client experience and maintaining this experience as your business grows.

4. Increased team capacity

Workflows help a single title processor or group of processors engage on a file without missing critical elements—they are essentially a safety net for your operation. Workflows aren't meant to replace the knowledge of a title expert—they are designed to support title professionals who are often managing a number of different tasks and files at once. Even for the most seasoned title professional who can "complete a file with their eyes closed," workflows and tasks are essential in maintaining operational continuity. For example, in the case of a processor going on vacation or becoming sick, workflows help a team member pick up on that person's tasks without missing a beat.

Meet the experts

This guide is designed to provide system administrators with best practices for setting up powerful workflows and processes. Qualia's expert contributors together possess decades of experience working in small and large title organizations to define and execute operations.

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In This Guide

Diagnose Your Operations
Symptoms that indicate your operational setup isn't working

As most system administrators know, investing in top-tier title & escrow software is not a silver bullet for seamless operations. The software provider's promises for improvements in communication, efficiency, and organization are only as strong as the user's ability to leverage the system's capabilities. The technology must be properly set up and adopted by staff for the business to see true efficiency gains. There are four telltale signs or "symptoms" that software is not set up properly.

Symptom 1: Lack of employee buy-in
Employees are using their own personal checklists and cheat sheets to complete the work on a file. Title & escrow folks are masters at identifying the most efficient way to get a job done, so if your staff is using workarounds, it's a signal that your process isn't working.

Symptom 2: An inability to transition files between employees
An employee's individual knowledge of files is the source of truth on the status of files instead of an established process. When employees are out of the office, this signal becomes glaringly obvious because the file faces major disruption. When properly set up, the process should have the ability to allow other team members to step in and understand what has already been done and what still needs to be completed with an individual file.

Symptom 3: Excessive manual progress tracking
Employees and management spend an inordinate amount of time creating and maintaining manual status tracking spreadsheets to keep tabs on production pipelines. Also, when an operations

manager says something like "I didn't know my staff wasn't doing X until after I audited the file," it's a sign that processes aren't set up properly for operations to track specific task completions.

Symptom 4: An over-reliance on familiar system features
If you see that you have 50+ unique workflows rather than utilizing system features designed to customize the "base" elements of the process (the workflow) then you are likely over-utilizing certain system functionalities. This is often the root cause of the other symptoms described above. functionalities. This is often the root cause of the other symptoms described above.
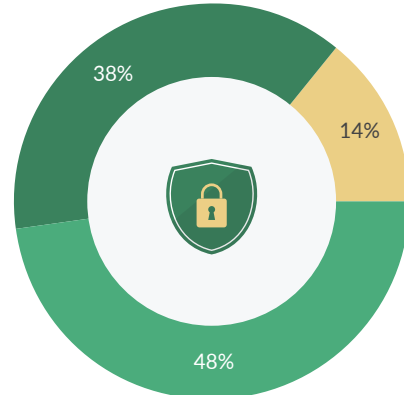
The Building Blocks of Powerful Processes
Defining terms for key system elements that make up an operational set up

It's important to have a complete understanding of the procedural tools within your title production software and use them to set up effective team-wide processes. Using title production software to guide processes can do more than just ensure that your staff remembers all the steps in a process, it can also enable better reporting, vendor performance tracking, and automation of simple, repeatable functions.

To clearly define the procedural tools available, we'll use Qualia as an example. Within Qualia, there are 3 foundational elements: **workflows, Smart Action Groups, and document types.**

Building block 1: Workflows
What types of transactions do you perform?
Workflows are the basic tasks required for the processing of a transaction type. Workflows are meant to be the foundation of a process, not the whole process.

These basic elements are always the same regardless of the client or location. By narrowing to **a handful of basic workflows based on transaction type** (for example a workflow for refinances, one for residential purchases, and one for commercial purchases), it's simpler to train staff and to track performance. Workflows also give teams a backbone of common elements for reporting across multiple offices, states, and clients.

Building block 2: Smart Action Groups
*What are the variations to these transactions?*
If workflows are the foundation, Smart Actions are the ground floor built on the foundation. They should encompass the next layer of complexity in a workflow which includes the tasks that are specific to a location, client, or product type. For example, in a

purchase transaction occurring in Arizona, the workflow used would encompass the common elements to all purchase transactions while the Smart Action Group would include the specific tasks required in Arizona cash transactions.

Building block 3: Document types
How can you support the transaction types and variations?
Document types are the various supporting documents that are used for each Smart Action Group. They should be named with a standard naming convention that allows the team to easily identify what a document is for by simply looking at the title of the document.

Workflows

Smart Action Groups

Document Types
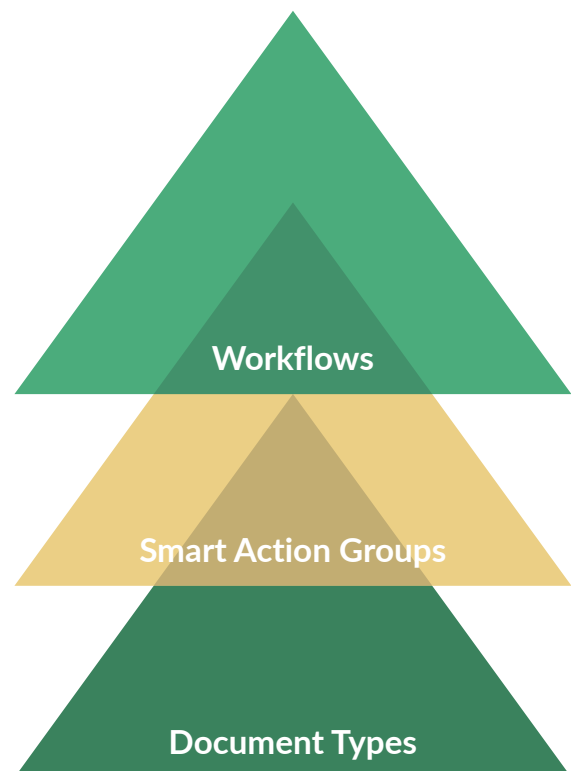
Define a Standard Operating Procedure

How to standardize a workflow design to ensure consistency and measurability

To properly set up your workflows, it's important to standardize the tasks within each workflow and workflow variation. With a standard operating procedure (SOP), users can intuitively understand new processes and take over a file when necessary to complete tasks when a team member is overloaded or unexpectedly out of the office.

Qualia recently conducted a survey to uncover the value of simplified and standardized processes for title operations. The research included responses from agencies of all sizes across the country.

Among other observations, the survey results demonstrated that workflow standardization frequently correlates with higher efficiency and greater pipeline visibility.

If standardization is a key characteristic of operational success, then building an SOP is essential. To build an SOP, each transaction possibility should be mapped from start to finish and drawn out on a whiteboard or in a process visualization tool.

From there, the process can be plotted into a common framework that ensures each task is well-defined with the following elements (below).

Elements of a standard operating procedure

✅ **Placement:** identify where the task should be placed in the workflow. Tasks should be grouped in chronological order by role type.

✅ **Name:** use a naming convention to set up tasks so you can quickly identify where the task falls in the order and who should complete it (the name should include: role, what the task is, description of task

being done). Task names are often an overlooked tool; however, they are quite valuable when used correctly. In fact, when used consistently, task names can actually help staff understand the progress of a file just by looking at the list of current active tasks.

✅ **Start trigger:** assign when the task should start. It's important to trigger a task only when it's possible to start working on that particular task.

✅ **Work:** a single task should track a single activity vs an entire set of activities. For example, "create a closing package" should be divided into multiple activities such as "get closing documents from the lender" and "email documents back to the lender." Defining the work being tracked by a task can often help managers surface over or underused tasks.

✅ **Due date:** when properly set up, due dates should "stack" on top of one another. This step is often where admins fall short and fill in due dates with ad-hoc estimations. When due dates are not correctly assigned, it's impossible for an admin to see which files are falling behind and where extra support is needed.

✅ **Completion trigger:** The completion of a task will either be manual or system triggered/automatic. There is a common assumption that more automation is always better than less. Automation for the sake of automation is never a good idea. For example, balancing a closing disclosure (CD) likely requires one or more revisions. If a CD task is automatically marked complete after the file is sent to the lender, then there would be no indication or reminder that more steps are needed to apply revisions to the file. In this case, the staff would need to remember to apply revisions which opens up opportunities for missed or delayed tasks.

Training Teams for Operational Success

Consistent learning & training to ensure operational consistency

With the steps outlined above, your team can standardize operations and begin the journey towards more consistent and streamlined processes. Equally important to building these processes however is effective training.

Title & escrow companies that effectively onboard their employees onto systems and continue to offer software training and support will make the most of their software investment and see efficiency gains.

For example, title & escrow professionals on Qualia's platform receive online learning tools and training videos. These training tools are utilized during onboarding and can be referenced when an agent faces a novel situation and needs a refresher on the software functionality for a particular workflow.

Providing formalized learning programs not only keeps employees happy and engaged, it also provides a built-in mechanism for businesses to develop leaders who can make confident decisions and help drive the business forward during times of change. Effective training solutions typically meet the following standards:

Flexible and self-paced

Today's learner expects go-at-your-own-pace training he or she can access anytime and any place. Research indicates that employees who can access training materials on their own time are more likely to feel optimistic about technology changes.

For example, Qualia University, an online learning platform, offers self-paced, modular courses so learners can take courses applicable to their role in any order and at any time. The platform is also built on a web-based portal, so learners can access training anywhere.

Bite sized content

Today's learner wants highly-accessible information at their fingertips to problem-solve for specific scenarios and troubleshoot in real-time.

Bite-sized, single-topic modules help learners search for and find the information they need quickly.

Incentives and interactivity

Research indicates that 70% of business transformation efforts fail because employee engagement is lacking. Interactive educational platforms help employers make learning fun. By combining education with game-like elements, users are instantly rewarded through real-time feedback and achievement recognition.
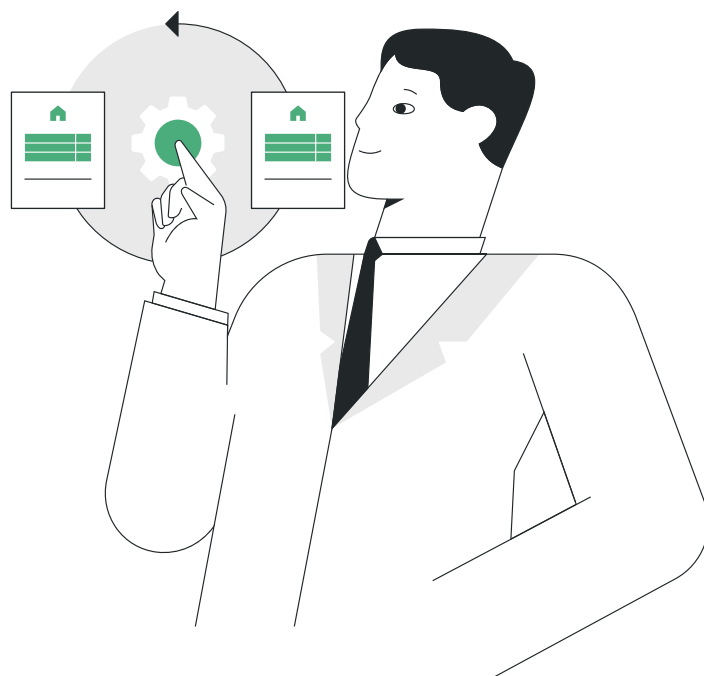
It All Starts With the Right Technology

The right title software can make or break your operations. Larger title & escrow companies often need more granular workflows because of the many hands touching a single file. A software provider with the necessary level of task granularity is foundational for success.

On top of having the necessary automation to ensure every piece of the operational puzzle can be mapped out, the right software provider will also offer an intuitive user design and on-demand training to ensure every staff member can easily learn the operating system.

Click here to learn more about Qualia workflow features designed for your operation and **schedule a time** with one of our Qualia product specialists.