

Title Company Case Study

How Clear Title LLC Implemented *Atlas Software Solutions*
to Switch to a 100% digital Paperless Environment



We currently have integration with SoftPro Title Software. Atlas can synchronize with any settlement software that can push to an API.

- ✓ In a digital world, Lisa, the owner of Clear Title LLC, wondered why she couldn't have information at her fingertips based on index information and key word searches.
- ✓ Now, Lisa has an affordable way to store information that is synchronized with her title software so she doesn't have to key in information.
- ✓ She has found an easy way to combine information, convert it to a pdf, and send it to customers all in a secured environment.
- ✓ Atlas provides another layer for data security where physical file are not subject to disaster or local servers are exposed to hackers.

OVERVIEW

Clear Title LLC was in search of a more convenient and effective way to better serve their customers. This multiple-location company serves clients such as banks, lenders, buyers, sellers, CPA's, courthouses, attorneys, real estate agents, and homeowners associations, and needed a more convenient way to store and distribute a surplus of documents. Purchasing and storing yet another fireproof filing cabinet, and paying for a facility to store this seemed archaic and absurd in today's technological environment; however, the perception of switching to paperless document storage seemed unattainable for this company as they continued to manage the inefficiencies of a non-digital system.

Another pressing concern for the owner of this company was the fear of losing these documents, be it due to fire, flood, or other means of natural disaster. Their current disaster and recovery backup plan desperately needed an extra measure of security.

Having a system that was not equipped with a means, such as a customer portal, to send and secure sensitive information proved to be a hindrance for her business. Another inconvenience for her was the hassle of having to spend time and money searching for her customers' documents. Lisa longed for a system that would allow her to search for information with a mere press of a button. She found that her process of spending extra time searching through files upon files for information was absurd considering the digital age. She realized the margin of human error within her business was too large. How was she supposed to rest easy knowing her documents could be lost, misplaced, or simply unable to find? This is why she looked to Atlas Software Solutions to help her resolve these pain points.

“The level of our customer service bar is off the charts, not to mention our customer referrals, says Lisa Walker, a top performing customer of First American Title Co.



WHAT ATLAS HAD TO OFFER

Atlas allows for an entirely paperless environment that would help them to increase customer satisfaction without creating additional time requirements. An aspect of Atlas's software that was most appealing to Lisa is its ability to provide a fast and simple solution that did not break her bank. "I love love love love our turnaround time in minutes, even when the transaction was several years prior," she says.

Atlas's document storage with workflow automation allows her to send and store her customers sensitive information without the inconvenience of searching through bulky filing cabinets. This means that she no longer has the need for facility space to accommodate. Clear Title LLC was able to work with Atlas's easy-to-use software system to improve their document-search process. Instead of foraging through multiple filing cabinets, Clear Title LLC is now able to complete key-word searches to efficiently find the necessary documents.

Since working with Atlas, Clear Title LLC can rest easy knowing that documents are backed up with multiple redundancies, and the potential strike of a disaster is no longer a threat to business. Their confidence in what they do has grown tremendously as they are now certain that they are three steps ahead of their competitors. Post implementation, they were able to save money with less facility costs, as well as increase employee satisfaction. They are now able to do their jobs remotely and cover for other employees at different locations.

RESULTS

After implementing Atlas Software Solutions, that is synchronized with their settlement software, Lisa has found that their customer service is "off the charts," not to mention their customer referrals. They have found it significantly easier to find their clients' requested information and deliver it in a timely manner. "The extremely affordable price of Atlas Software makes this operation-change a no-brainer," says Lisa. Now 100% digital, this paperless company has managed to increase customer satisfaction without creating additional time requirements and without the added clutter of physical files.

***“ It is so easy to combine requested information in the correct order, convert it to a PDF, and—in a secured environment—email it to requesting parties.*”**

