

Exceeding Expectations: Building Customer Relationships with Value-Adding Services

CASE STUDY

OVERVIEW

How do you build a purposeful business in the title industry? What's the role of technology in offering exceptional customer service to homebuyers? And how does a newly established title company scale while complying with critical deadlines?

Here's what **Melissa Daniels**, a title industry expert with over 30 years of experience and **the CEO of Texas Family Title (TFTitle)**, shared.



Easy



On time



Stress free



Frictionless



All workflows are on schedule, regardless of how complex. Our vendors are delivering best-in-class technology solutions that create a friction-less experience for all involved. In the end, the **closing process is easy, on time, and stress-free** for our customers.



WHAT WOULD A PERFECT CLOSING PROCESS LOOK LIKE?

Melissa shared the importance of investing and upgrading her tech infrastructure further to accommodate the fast-paced digital needs of her customers better.

To create a personalized experience for each of her customers, she needed the ability to meet her customer's closing preferences while simultaneously increasing communication and transparency.



Melissa Daniels
CEO, Texas Family Title

HOW CAN TITLE & ESCROW COMPANIES OFFER EXCEPTIONAL CUSTOMER SERVICE?

For Melissa and the TFTitle team, the answer is seamless communication and transparency throughout the closing process.

In fact, they are not treating home-buying as a simple transaction but as a well-communicated relationship that offers frequent and detailed updates throughout the process.

Making sure home sellers and buyers understand every step of the process and ensuring their peace of mind that the TFTitle team has their back.

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Ensuring security and building trust

- 1** Secure documents portal
- 2** Protected exchange of personal and payment information
- 3** Technology to build trust and ensure smooth communication

For this communication to be stress-free and secure, TFTitle has been investing in a secure doc portal that ensures a protected exchange of updates, documents, and payments.

For TFTitle, cyber security is a top priority, especially when dealing with clients' personal and payment information.

Technology has become a bulletproof way for Melisa and her team to build trust and ensure smooth communication with customers, as well as realtors, mortgage brokers, and lenders.

To exceed everyone's expectations along with investing in future-proofed technologies, Melissa chooses to partner with vendors who share her business perspective.



HOW TO SET UP & SCALE A SUCCESSFUL TITLE BUSINESS?

Earlier this year, Melissa decided to open her family-owned business in Texas, close to home. Driven by her goal to build a company grounded in tradition and family values, she emphasized the importance of personalized customer experiences.

To support those goals, Melissa and the team at Texas Family Title knew the significance of technology to their growth strategy. The company's CTO was tasked with the discovery and integration of technology that established TFTitle as a nimble and flexible business.

TFTitle contributes their rapid go to market on their investment in solutions that require low infrastructure investment, are quick to deploy, and are intuitive for the end users.

REXERA SOLUTION & BENEFITS

Melissa is a long-time client of Rexera. Before starting her own business, Melissa used our service in her past three companies.

The added value in working with Rexera for Melissa stems from our willingness to go above and beyond to get the necessary information to close a deal on time.

- 1 Convenience and ease of use of portal
- 2 Responsiveness and quick resolutions
- 3 Care with which the team handles the work



Why does a closing have to feel like a transaction? When a closing goes sideways, and you have a **partner like Rexera** that sends someone to the HOA office in person to help resolve the issue, that is a partner that understands that buying a home is personal, not a transaction. That is an example of Rexera going above and beyond that directly **supports the vision for my business.**





TEXAS FAMILY TITLE'S RESULTS

100% accuracy ratio

5 days avg order completion time

10+ days early delivery vs closing date

Is There Added Value in Fronting HOA Fees?

For Melissa, it's not good customer service to ask the client to pay those fees upfront, and in her 30 years at the job, she's never done it. It feels very transactional to the customer and adds administrative burden to her team. She prefers to handle them herself and deduct them at closure.

That's why Rexera fronting the fees not only helps her keep delivering impeccable service but also not putting pressure on TFTitle's accounting.

Is It Worth Outsourcing HOA Docs Acquisition?

Melissa shares that relying on a partner who is able to cut on a cumbersome and multi-step job is an undeniable advantage. It saves her time that she can relocate to focusing on her customers, ensuring they are happy with her services.

Ultimately, scaling TFTitle's business requires Melissa and her team to be fully engaged with the needs of their clients. And Rexera allows them to do it.



It's a **'feel the deal'** for me. Anyone who can consistently deliver and is willing to treat my customers like their family is someone I want on my side. After reviewing other vendors, I **keep coming back to Rexera** as the vendor I trust most with my customers .

