

CASE STUDY

MT Escrow





MT Escrow is an independent escrow agency that processes transactions in Southern California.

- HQ** | Westlake Village, CA
- Founded** | 2018
- Industry** | Escrow Agency
- Website** | mtescrow.net

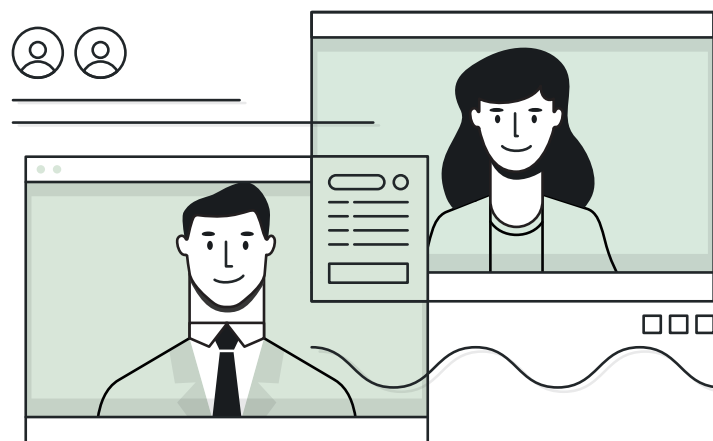
MT Escrow Provides a Small Business Feel While Completing a High Volume of Transactions

Overview

MT Escrow is a full service, independent escrow agency that serves Southern California communities. Matthew Bolin, President of MT Escrow, and his team process residential, commercial, vacant land, and refinance transactions, as well as foreclosed properties that have yet to be sold by the lender.

Challenge

Matthew and his team have had extensive experience with other escrow software programs but they wanted to find a software that allowed them to make it their own. He had previously worked within a Disk Operated System (DOS) but it didn't allow for integrations with their bank, email platforms, or vendors. Additionally, the DOS-based program required Matthew to maintain a physical server in the office, which made updating the software very difficult and expensive. Matthew wanted to find a more modern platform that supported these integrations and allowed him the ability to tailor the platform to his team's needs.



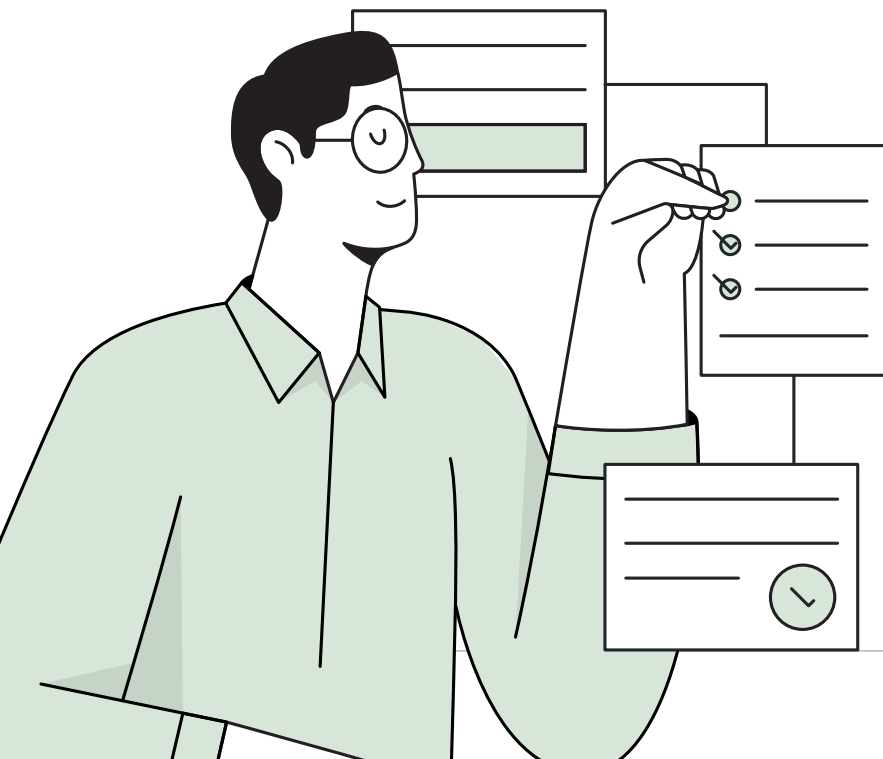
“ I’ve been working in escrow for a while and I originally went with a DOS-based program. It had to be hosted on a single server and it didn’t integrate well with email. It met my needs, but it was a no-brainer when one of my colleagues told me about Qualia. Qualia was a much better fit because it allowed us to do everthing we wanted to do before. ”

– Matthew Bolin, President of MT Escrow

Qualia gave the MT Escrow team the freedom and efficiency they were craving.

Solution

Qualia gave the MT Escrow team the freedom and efficiency they were craving. With Qualia, they were able to customize what they needed, from documents to escrow packages, and decrease time spent re-entering data or working within additional platforms, such as vendor websites or email platforms. Furthermore, with Qualia being a cloud-based platform, the platform was always current and required no effort from users to implement valuable updates.



Efficiency Gains

In their previous software, Matthew and his team had to spend hours completing data entry for each order. With Qualia, the order entry process can be cut down to 15 minutes. Data that is entered populates in its correlating fields in other parts of the file, ensuring that information is accurate and data entry time is minimized.

Another time-saving aspect of the Qualia platform is that it is fully integrated with many email platforms and vendors, making it simple to communicate with clients and vendors alike. Users can complete these tasks without having to leave the Qualia platform, further accelerating order processing time. Additionally, Qualia's ability to integrate with their bank makes end-of-month reconciliations painless. Matthew shared that because of this, his monthly reconciliations take less than 15 minutes to complete. team's needs.

“I’ve worked with many different popular escrow software programs and I’ve asked every single one to add features like the ones Qualia has out of the box. They just couldn’t do it. When someone showed me Qualia, I felt like this was the best-kept secret.

– Matthew Bolin, President of MT Escrow

Ability to Customize

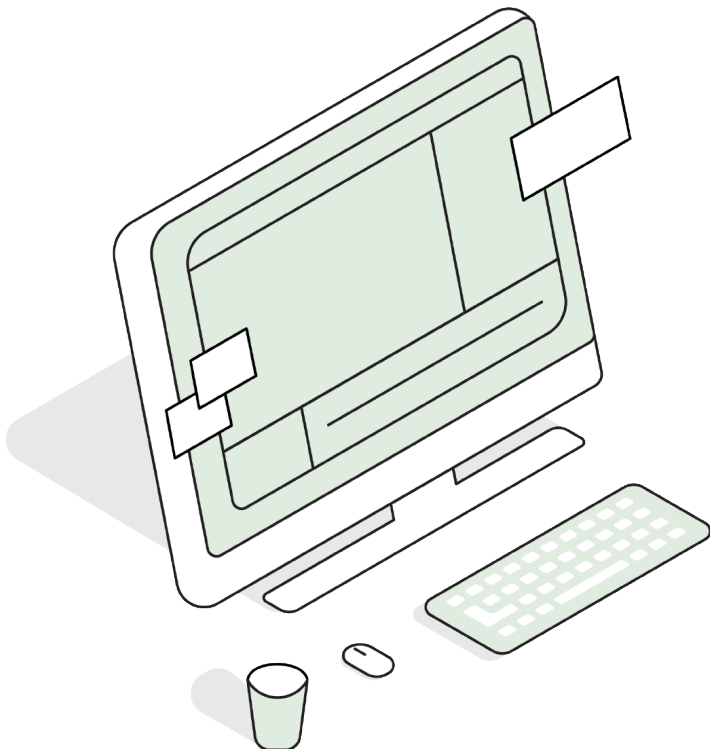
Another factor that Matthew was looking for in a new software was the ability to tailor the platform to his team's needs. With Qualia, Matthew was able to do this through the Admin section of the platform. Within the Admin section, Matthew was able to customize documents and create custom document packages.

Matthew shared that the most useful Qualia feature is the ability to customize documents. Qualia allows for users to create custom documents and SmartTags to set up their closing documents exactly as they would like. When the custom document is used in an order, the SmartTags will pull in that order's specific information, such as the borrower's name, property address, and closing date. This saves his team time and ensures that all closing documents include accurate information, greatly reducing the risk of human error.

The MT Escrow team has been able to greatly increase their order volume, while providing their customers with individualized, high quality service.

Results

Through the ability to customize and seamlessly access other integrations within the platform, the MT Escrow team was able to customize the Qualia Platform to fit exactly what they needed. Because of this, they were able to cut down on time spent completing order entry, communicating with vendors and clients, and completing monthly reconciliations. With this time saved, the MT Escrow team has been able to greatly increase their order volume, while providing their customers with individualized, high-quality service.



“ Thanks to Qualia we can spend more time focusing on our customer service, rather than spending time doing multiple data entry. By switching to Qualia, we have saved so much time.

We have been able to rebrand our image – we can offer that same level of customer service that a mom and pop shop can offer while opening 300 files a month. We can treat our clients like they are our only client because of how well Qualia integrates. The system really works for us.”

– Matthew Bolin, President of MT Escrow

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Contact us at qualia.com/demo

