



## Customer Story

# Northwest Title Utilizes Informer to Visualize and Achieve Customer Success Goals

*Conversation with Jonathan Holfinger, President, Northwest Title and Mackenzie Fennell, Business Intelligence Manager, Northwest Title*

## Pain points

- Lacking a user-friendly and scalable solution to visualize and track customer success and team performance data
- Old methods of reporting were too time-consuming to hold the company accountable for goals and to predict direction
- Did not have a trained, dedicated business intelligence employee

## Results

- Managers more willing to make data-driven decisions with understandable visualizations and accurate data
- Objectives organized in a way that makes them easier to follow through on
- Increase in the number of outstanding customer reviews with use of trackable customer service performance standards



## Northwest Title Customer Story

### Challenge

Northwest Title are industry leaders with experience in complex real estate transactions of all types including residential, commercial, and land development. Northwest Title emphasizes precision and top-notch customer service, and in 2021 the company was named as one of Central Ohio's Best Places to Work. Jonathan Holfinger, President of Northwest Title, is a licensed attorney and title insurance agent in multiple states. Aside from overseeing the general operations of the company, Jonathan works closely alongside escrow and administrative staff. His job encompasses many responsibilities as he also serves the Ohio Land Title Association as its President, and additionally provides continuing education to the industry.

Jonathan and team were lacking a scalable and easily managed solution to track data such as customer success and team performance. "Our ability to set and track goals was limited by the reporting software that was included in our title production system, and we were unable to find a satisfactory solution until we tried Informer," said Holfinger. Northwest Title had stated objectives, but most of the tracking and reporting was solely about key financial metrics, and not on the details of what was happening within transactions. The various reporting software they had tried were not able to effectively measure response times and gaps in action items within the title and settlement transaction process. Northwest Title was only able to gauge their performance based upon order counts, numbers of closings by location, revenue numbers, and similar macro reports, and these were insufficient in providing a complete picture.

In addition, the amount of time and effort it took to create visuals in Excel or using spreadsheet grids was not sustainable, nor did they create actionable change or digestible visualizations to show trends. Aside from lacking a data-tracking solution, Northwest Title was utilizing staff that served various roles to try to compile the macro-level data across departments. They did not have a dedicated, trained business intelligence employee.

## Solution

Installing Informer and utilizing visualizations greatly benefited Northwest Title. “Orange Standards,” which are Northwest Title’s customer success standards that help them ensure customers are being served well, were now able to be revised and became much more specific to how well tasks were completed within the transaction process. Although Orange Standards existed prior to Informer, they were more aspirational, rather than truly actionable performance standards. For example, Northwest Title aspired to send recordables to the county within 24 hours of closing, but this could not be verified until they had Informer’s visualizations and ability to track the time between tasks completed in RamQuest’s production software.

In Informer, Northwest Title has over 50 Visuals tied to their Orange Standards, many of which relate to tracking the time it takes to complete certain tasks. With Informer, they track task completion times in the production system such as how long it takes their abstractors to complete title searches, the time it takes to produce title commitments, and how long it takes staff to review the commitments and send them to customers. They also track how quickly they fix post-closing issues, and how fast they fully open an order in the production system from the time the order is emailed to them. Northwest Title also uses Informer to measure internal culture goals for their teams and leadership groups.

Since Northwest Title did not have a dedicated business intelligence employee, it was important that Informer be easy to learn. Mackenzie Fennell previously worked as an Escrow Operations Specialist and Senior Marketing Specialist at Northwest Title. Fennell was a key person in managing the title production’s administrative platform and was very familiar with the datasets in the RamQuest system. She migrated to handling report creation needs, and when Informer proved to be so valuable with creating Visualizations, she became the company’s Business Intelligence Manager due to the value it adds to the company. Fennell did not have a coding or technical background but was able to learn how to utilize Informer with her prior understanding of the production system they use as their primary Dataset. “A user of Informer needs to understand the data and what it means, prior to being able to build reports and visuals with it. I have had no formal training in computer science or databases, and I was able to learn how to make basic reports on my own without any real training from Informer,” commented Holfinger.

## Results

According to Holfinger, "The creation of visualizations improved our employees' understanding of the data and helped to create actionable change." Managers at Northwest Title are far more willing to spend time looking at the visuals than they ever were before. Pivoting and drilling down were essential in getting their buy-in to look at the data and act based on what it shows. Informer has helped Northwest Title in becoming a more data-driven business. Holfinger mentioned, "Informer was what allowed us to truly track performance on our stated standards." With Informer, Northwest Title can measure and organize their goals in a way they previously could not, assisting them with accomplishing and following through with their objectives.

Feedback from Northwest Title's customers comes in the form of reviews, usually related to customer service, communications, and friendliness. With the use of customer service performance standards, many negative reviews have been eliminated, and in 2021 their number of 5-star reviews increased more than 40% year-over-year.

Informer has also helped ensure data integrity. Northwest Title uses Informer to report on bad data, and they have systems in place to clean it up. Fennell commented, "Having accurate data is such an integral piece of the business's success and our reporting is only as good as the data." She also mentioned, "The Informer reports create a great training tool and allow us to see where our weaknesses are."



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**Jonathan Holfinger, President, Northwest Title**