

# Sales & Marketing

Special Report



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# A WORD FROM OUR SPONSOR

Dear Readers,

I love this quote from **Seth Godin**: “Marketing is the generous act of helping others become who they seek to become. It involves creating honest stories — stories that resonate and spread.”

That’s what marketing should and could be — an act of generosity meant to inspire others.

That’s why Bowe Digital chose to sponsor *The Title Report’s* “Sales and Marketing special report.” Because we know that in this strange, ever-changing, constantly evolving niche industry we find ourselves in, effective marketing isn’t an option. It’s essential to our industry’s growth and survival. And it’s essential that your customers understand the value you provide.

We understand it, we get it, and we want to see everyone in our industry thrive.

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For companies looking to navigate strategically and communicate effectively through the mergers and acquisitions environment, we also provide Title Success-Powered by Bowe Digital.

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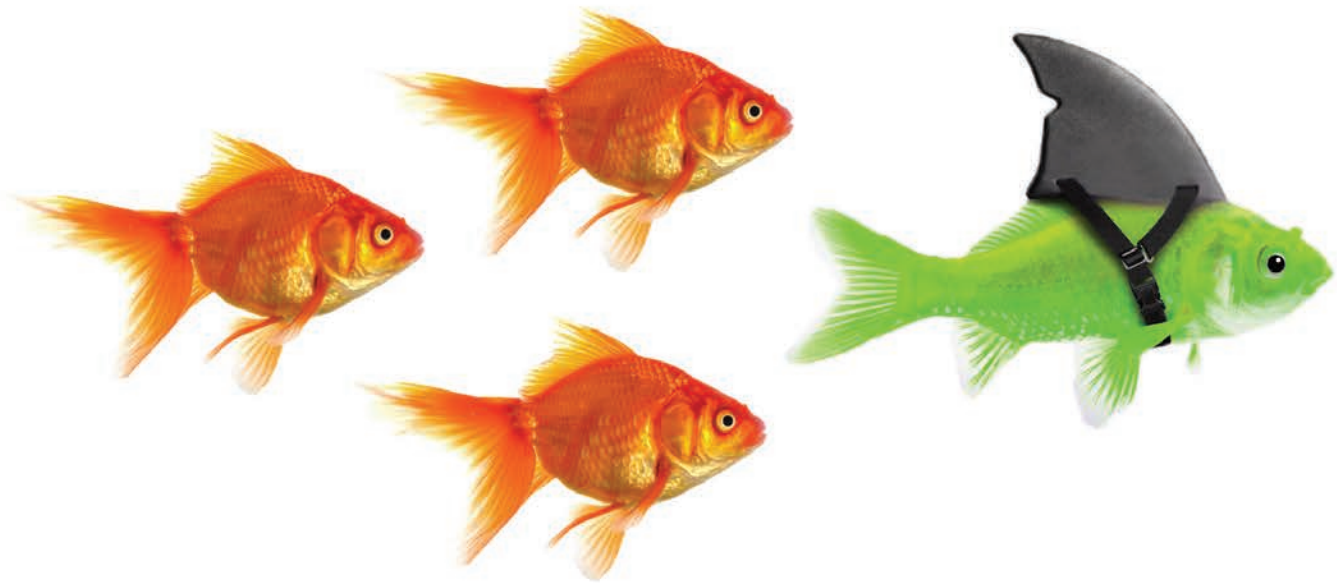
In this industry, so many factors are outside of our control. And this past year has been nothing short of a roller coaster. But what we can always control are the stories we tell and the value we provide our clients.

Bowe Digital is your partner on this journey. Your success is our success, and together, we can raise the bar for marketing excellence in this industry.

Sincerely,

**Wayne M. Stanley**  
President & CEO, Bowe Digital

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digital ads



team trainings &  
strategy sessions



public relations &  
press releases

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## Underwriters offer resources to help title agents' sales and marketing plans grow

Underwriters are helping title agents meet their sales and marketing goals through a number of efforts such as continuing education and continuing legal education (CE/CLE), promotion of new technology and reinforcement of long-standing industry ideals.

Representatives from several underwriters shared their recent experiences in this area with *The Title Report*.

**Linda Grahovec**, senior vice president, director of communications, education and marketing at Fidelity National Financial (FNF), said CE/CLE offerings to agents have proven extremely beneficial.

"For the past five years, we have focused on creating, curating and executing on bringing the best and most effective and comprehensive education and training to our title agents," she said. "We have grown our online educational platform from one geographical venue to a total of seven area venues and a national venue. What does that mean? Well, that means that we are able to offer most agents in most states, local, regional and national educational opportunities.

"We have also built out our FNF Speakers Bureau, so no matter how agents and their employees digest learning, we have a subject matter expert and speaker on a vast array of topics and able to deliver in any way needed."

In-person presentations for large groups, virtual or live-streamed webinars, a monthly broadcast on real-time high-level topics, relationships with land title associations and providing 24/7 access to an online learning library with over 500 courses were also cited by Grahovec as powerful tools from Fidelity for helping agents.

FNF has also recently rolled out a new MARQ-eting Store where dedicated marketing reps can provide customized marketing collateral, advertising materials or full social media campaigns to agents. There, Grahovec shares her expertise with agents by reviewing their marketing plans and materials to provide analysis and feedback on how to better create, communicate or achieve their sales goals.

She said the FNF Family of Companies has made a concerted effort to move away from reactive teaching opportunities to proactive structured training programs.





"Mainly, instead of having situations occurring in our industry that are good, bad, or typical and then developing training, we understand how the best title companies can be created, managed and assisted and we have proactively created training programs to assist in all areas of an agent's business," Grahovec said. "From title to escrow, we cover all bases which we did not just six to 10 years ago. "

In light of artificial intelligence, automation and other technology, Grahovec said learning new skills will be more and more important for all involved as time passes.

"We have seen advancements in all areas of our business and industry," she said. "Now, this is not unique to our industry. Most industries are changing and if businesses don't plan for the future, have discussions with their trusted advisors and truly make the time to work on their business versus in their business, their legacy will suffer in some way.

"Now more than ever we have to seriously think about reskilling and upskilling our employees to meet these challenges as well as those exciting opportunities. As automation occurs, those who take advantage of those new processes will allow their staff to have part of their work week open to expand into other areas of the company."

**Stephen Vincini**, president of First American Title Insurance Co.'s agency division, echoed Grahovec's sentiments regarding the importance of getting agents the best education options possible.

"Inspiring and empowering title agents to grow their business, especially in today's changing market, is key in helping them thrive," he said. "This begins by providing them with access to the latest information on regulatory changes and industry trends. Over the past 12 months, over 10,000 title agents and industry experts have attended First American Title webinars. First American agents also benefit from our on-demand digital learning materials spanning a wide array of topics, from sales and marketing

to anything related to title insurance and real estate finance.

"Additionally, providing title agents with tools and resources to help brand, promote and market their agency is critical. First American Title's marketing resource center – Agent Print Pro – provides agents with fresh, customizable marketing and education materials designed to help them stand out among competitors, build relationships and, most importantly, drive action."

Vincini said in a rapidly changing environment where market shifts are unpredictable, business is challenging, and resources are tight, real-time relevance and convenience are everything.

"Training, tools and resources have shifted from general industry education to agile, market-driven knowledge and expertise that specifically addresses the pain points title agents are experiencing today," he said. "By offering a library of self-paced, on-demand trainings, First American title agents can stay informed and current on industry trends at their convenience."

When title firms are researching industry partners and deciding where to get help for their agents, Vincini strongly advised to seek out a responsive and collaborative underwriting team that knows the business, has access to high-quality sales tools and educational resources to help hit the ground running, and is dedicated to innovation and implementing technology advancements to succeed in today's market.

**Scott Chandler**, chief operating officer for Westcor Land Title Insurance Co., said ensuring agents understand their markets with real-time market intelligence, coupled with sales and marketing CE training directed to 'clients, is a top priority when formulating assistance programs.

"Technology and efficiency offerings for the agents will allow the agent to focus on the consumer while the underwriters assume greater responsibility and offset risk with service offerings," he said. "A lot more emphasis will



be put on digital marketing like social media, websites, and email marketing. We continue to develop tools to help strengthen relationships and make their solutions more compelling. Title insurance is not the differentiator that will attract agents; the extra offerings are.”

Chandler offered advice for professionals new to the title industry who are trying to set up optimal underwriter-title agent relationships.

“They should choose an underwriter partner that will provide training, support and education to foster a successful launch,” he said. “They should lean heavily on their underwriters for some of the services where liability can be effectively offloaded to their partner, for a fair price. The relationship between sales, marketing, and inside operations is crucial.”

**Michelle Lenahan**, executive vice president and chief marketing and communications officer at Old Republic National Title Insurance Co., said services offered by her company include customizable marketing content such as flyers, social media posts, text messaging templates and videos through their ezMarket portal.

Additionally, Old Republic Title provides access to a social media platform called ezShare that allows the agent to schedule and post content to multiple channels.

Lenahan added that Old Republic Title is focused on expanding in areas including customizable video production.

“Not only are we focused on bolstering agents’ marketing efforts, but also their work in continually improving the customer experience

and building trust with potential clients,” she said.

Through Old Republic’s Agency University, title agents have access to business development, strategy planning and sales training through highly acclaimed mentorship program, reports **Sandra Schoen**, executive vice president and director of agency operations.

“Using our online LMS platform, called ezLearning, we provide CE and CLE education and training with online and on-demand title industry training courses,” she said. “This allows our agents to access accredited learning and non-accredited courses so they can explore new topics and develop new skills at their convenience.”

Finding an underwriter dedicated to the success of the independent title agent and the industry should be of the utmost importance to any title agent, Schoen added.

“Look for evidence that the company is invested in their agents,” she

said. “The relationship involves more than just policy coverages and pricing. It should be collaborative and interdependent, with effective communication at its core.”

Multiple leaders from WFG National Title Insurance Co. said Chairman and founder **Patrick Stone** challenged his company roughly 10 years ago to shift away from traditional support models and find better, more innovative ways of providing sales and marketing assistance.

“(Stone) told us CE classes are important,” Executive Vice President, Agency Operations **Gene Rebadow** said. “But we needed to help title agents increase their market share and

“A lot more emphasis will be put on digital marketing like social media, websites, and email marketing. ... Title insurance is not the differentiator that will attract agents; the extra offerings are.”

— **Scott Chandler**,  
Westcor Land Title Insurance  
Chief Operating Officer



be successful. Each year, our team has strived to push the boundaries and produce an event like no other in the title and settlement services industry.”

Stone said his company’s annual Spark event, the seventh of which was hosted in 2022 following a two-year pandemic hiatus, has been instrumental in rolling out strategic plans for helping agents. More than 500 agents attended last year’s event.

“As a national underwriter, we have many valuable internal resources that are unavailable to most title agents,” Stone said. “The idea behind Spark was to empower our agents by openly sharing our knowledge and resources with them.”

In 2017, WFG expanded its title agent support initiatives with the launch of the WFG Blocks program, through which WFG offers its title agents direct access to the same services the national title underwriter uses within its direct operations.

“These are services that do not necessarily have a market identity, so they can be used successfully without compromising a title agent’s established position in their market,” said Stone. “The idea behind Blocks is that by having access to these services agents can operate with more efficiency

and cost-effectiveness, make more money, and be more successful.”

Vice President, Director of WFG Blocks **Jaime Johnson** added, “Part of Pat’s goal for the Blocks program was to help our title agents move fixed costs to variable costs so that they’re able to save money, especially when there’s a downturn in business. By only paying for those services that they need, when they need them, they can greatly reduce overhead.”

Leaders offered details on the marketing and sales Block, saying it helps title agents boost market identity and hone sales strategy by providing access to a branded marketing content portal, marketing and sales training, personalized advice and support and marketing resources.

“WFG runs direct operations in seven western states and we’re constantly learning what things work, what things don’t, and what things we want to double down on because they’re making a good impact,” Executive Vice President and Director of Strategic Initiatives **Justin Tucker** said.

“That’s what this Block embodies. It’s all of the lessons we’ve learned from a sales and marketing standpoint that we can translate over to our agency world and help them grow.”

## ChatGPT, video editing, CRM engines among top marketing tools

What are five marketing tools a title agent can’t do without?

*The Title Report* posed that question to a pair of industry leaders. Their answers ranged from new automated text creation platforms like ChatGPT to top-of-the-line solutions for video creation and graphic design.

“Marketing has changed a lot over the past few

years,” CloseSimple co-founder **Bill Svoboda** said.

“With tons of things competing for our attention, we’re easily distracted, so, content has needed to adapt – it’s got to be quick, catchy, and easy to get. Because of this, social media has been all about videos these days, making us stay and interact more. It’s about keeping us hooked and engaged.”

Svoboda provided a list of his top five marketing tools.

1. **Video editing software:** “The first tool that anyone should have is an easy-to-use video editing software,” he said. “Although everything is being pushed towards a mobile-first experience, I recommend having a laptop or desktop to make video editing easier – and the simplest one for anyone to use on a desktop is iMovie, which comes standard on any Mac. Otherwise, you could use Adobe Premiere if you do not have a Mac, or if you wanted to have a more robust video editing capability.”
2. **Kapwing.com:** “This site allows you to make videos that are perfect for social media – with the captioned text on the screen in a cool font and color,” Svoboda said. “This tool can also do basic video editing and more importantly, cut out the dead-air between breaths if you want to keep the video moving, taking a video from 50 seconds down to 40 seconds, without the pauses.”
3. **Use of Canva:** “It’s nice to start with a free subscription, but the power of Canva really gets unlocked when you upgrade to the Pro or Team subscription, which is still very economical,” he said. “A title company can use Canva to create images for social media, newsletters, signs or any other marketing need based on a brand kit that you can create. However, my favorite part of Canva is the ‘Background Remover’ tool (not available in the free plan) because it enables the user to get professional headshots by removing the background from any picture. This can be very time-consuming if you had to do the same process manually.”
4. **TikTok, Instagram, Facebook, YouTube, but not just for posting content:** “I highly recommend using these platforms to look for inspiration, research current trends with marketing and sales, workflow automation, team-building exercises, and especially trends in artificial intelligence (AI) for marketing, sales and automation,” Svoboda said. “You will find some of the newest ideas by doing this – but have a notepad or web

browser handy so you can write down, or go to, the sites, software and tips you learn about.”

5. **ChatGPT:** “It can help you brainstorm creative ways to do things that you otherwise might not have thought about,” he explained. “For instance, if I was going to give a pep talk to my team about how we need to ‘get more done, but still have fun doing it,’ I might ask ChatGPT for 10 ways I can present this idea to my team without sounding overbearing or like a typical ‘boss’ that just wants the team to work harder. You can ask ChatGPT for actual examples in other industries – maybe ask for examples from how the Ritz Carlton treats their staff or what title and escrow companies can learn from Chik-fil-A’s manager training program. The possibilities are endless, but you can also ask for marketing/sales strategies to reach real estate agents and lenders, create sales letters to reach new real estate agents or countless other things that can help push your business forward.”

It’s important to put the effectiveness of such tools in perspective, Svoboda said. He believes many businesses put unrealistic expectations on the impact social media can have on growth and online presence.

“While social media is good to have, I don’t think title and escrow companies are seeing the return on investment they are making for all the time discussing social media and strategies,” Svoboda said. “However, the most undervalued aspect of social media is the power of reposting or resharing content. First, an executive or team member of a title or escrow company should be reposting or resharing a company’s social media content. This doesn’t mean reposting or resharing each post that the company does, but there should be a concerted effort for team members to engage with posts beyond simply liking or commenting on the initial post. I’ve found that resharing or reposting content with the individual team members’ unique perspective on it, or why they are excited to work at the company, can







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equal from 500 percent to 1,000 percent more engagement than the company's initial post."

**Becky Tassell**, chief marketing officer at PropLogix, shared her own list and said a good jumping off point in identifying the most useful tools is keeping all business stakeholders in mind.

"Subject matter expertise and experience is the key to creating valuable content," she said. "You should constantly be leveraging others to share insights, co-host a blog, webinar, or podcast. Maybe even get someone to come in person to run a training session for your Realtors or go live on Facebook for a candid chat on hot industry topics. However you can leverage other people's strengths, do it. The collaboration of two parties always helps gain visibility into spaces you might not have access to. Symbiotic relationships was always my favorite lesson in science class."

1. **A really good CRM and marketing**

**engine:** "HubSpot and Salesforce are the top two leaders in this space," Tassell said. "From custom profiling and built-in pipeline dependencies, to automated email workflows based on customer engagement, it's all in one place. Targeted and relevant messaging is so important because it's expected by your customers, given the technological world we live in. A good sales and marketing engine you can count on is going to be the number one tool needed for success. These tools are incredibly robust, and there are help centers built into the platforms with hours upon hours of videos, training courses, and opportunities for certifications to help you become an expert."

2. **A social media management tool:** "I would recommend Hootsuite," Tassell said. "After looking into the alternatives, Hootsuite's features and integrations were well worth the money compared to the alternatives at the same cost. This tool not only helps you grow your following and increase engagement, but it gives you the ability to plan and schedule all your posts in advance

from one place, making your life that much easier and efficient. It also allows you to track your performance, and the dashboard is very user-friendly even if you're not a marketing professional."

3. **Grammarly:** "It's a great tool to double-check spelling and grammar on all written content, including emails," Tassell said. "The term 'marketing' is practically interchangeable with 'free education' these days. People are looking for answers to questions, and you want your company to be the one answering them, but you'd hate for people to find a spelling or grammar error in your work. It doesn't matter how good the writer is, we're all human and make mistakes. However, if those mistakes are found, they're typically judged. The human element is forgotten when reading content online. If simple mistakes are found, it's easy for a prospect or customer to lose trust when they perceive you didn't pay attention to detail. So, write blogs, guides, robust website and landing pages, but make sure you have a tool and a human checking your work before you push it live."
4. **Calendly:** "With everyone's busy schedules and reps out on the road, it is incredibly valuable to have this linked with your calendar," Tassell said. "This allows your customers to click a link to find and book a meeting time that works for them. It helps to avoid the 10 emails going back and forth trying to figure out what would work best, and it also lets your customer know you care about what is convenient for them as well."
5. **ChatGPT:** "As everyone is aware, this is the direction of our future," she said. "Ask it a question and it shall deliver an answer. It should definitely be used to help provide insight and direction for your own content ideas, provide knowledge to a sales rep on a topic before trying to discuss it with a prospect themselves, and discover how you can use software and systems for scheduling closings. This technology is incredible, and those who adopt it sooner rather than later will be recognized for



working smarter, not harder, allowing them to focus on what's important. This tool is great for supporting initiatives, but as we all know in this line of work there are certain aspects of the business and intangible knowledge that is irreplaceable."

Tassell also cited more established tools such as LinkedIn.

"It's so important to network, create relationships, and continue engaging with those relationships both in person and in the digital

world," she said.

"LinkedIn has a Social Selling Index (SSI) where sales reps and marketers can actually check their SSI score to see if they are doing enough to gain visibility on LinkedIn to grow and build their network. LinkedIn allows you to be associated with your company, but also be recognized as an individual, with your own brand, and gain authority and trust as a professional. Share content, create your own opinions, comment and engage with others, be creative, celebrate others' success, and have fun."

## Successful sales techniques are more important than ever

Even through drastic changes in industry norms and giant technological leaps, tried and true person-to-person sales skills will always be a pivotal part of the title insurance industry.

Many of these techniques can boil down to understanding your target clientele, whether that's homebuyers, real estate agents, lenders, or property investors.

Experts who spoke on the matter with *The Title Report* say understanding a client's needs, pet peeves and goals is a prerequisite to forming successful sales approaches.

International speaker, author and CEO of Orange Leaf Consulting **Dr. Cindy McGovern** has earned the nickname "First Lady of Sales" through success on multiple career fronts.

She said the first step in optimizing sales is basing everything you do on sales, not service.

"Service is reactive; sales is proactive," she said. "Plan to be proactive. It's not enough to say you take care of every customer. Those customers are already in your corner. Plan to get ready for the customer you don't have yet. Sell, sell, sell."

McGovern said to consider every job at a title

agency or any business a "sales job."

"The members of your sales team are not the only ones who should be selling your company and your services. Every single person in the company should have 'sales' as a requirement of the job," she said. "That doesn't mean they need to close deals with clients or cold call prospects. That means that they need to treat every interaction, like a transaction, with every client (and potential client) as the one that could retain or lose that client. Your receptionist makes the first impression on clients, vendors, your colleagues and even your employees. Make sure he or she is professional, kind, attentive and helpful to everyone who walks in the door."

Collaboration with Realtors and their centers of influence should be at the forefront for any title business, and every employee should be viewed as a "walking commercial" for their respective company, McGovern added.

"Educate your staff about personal branding," she said. "The way your employees present themselves both to clients and out in the world during their off-hours reflects on the brand of your business. Each employee should create and live a personal brand that reflects well on



your company. More and more businesses are incorporating personal branding into their sales training.”

Educating clients, whether that’s homebuyers or fellow industry stakeholders, is becoming a larger part of title agencies’ jobs. Some industry authorities say that direct marketing and sales to homebuyers will be needed on a more regular basis in the future in the face of increased federal regulation.

In addition to building steady customer relationships, experts say demonstrating expertise in the industry, staying updated on market trends and keeping up with said regulation is key to locking in consistent sales numbers.

“Ask for business,” said McGovern. “Just because a client is with you today doesn’t mean he or she will be back. Ask every client to come back. Ask all of your clients — regularly — what else you can do to help them. Ask your clients to refer you to their colleagues and friends who might be in the market for your services. If you don’t ask, you don’t get. If you do ask, your chances of hearing a ‘yes’ skyrocket.”

No sales success should come without showing gratitude to those who chose your business, McGovern said.

“Without your clients, your business would fold,” she said. “Be grateful for your clients. They put the food on your table and the roof over your head. Tell them thank you. Show them that you’re glad they’re yours and you want to keep them. Remember their birthdays. Thank them for the referrals they give you. Send them occasional emails and even mail them cards to

let them know you’re thinking about them. If you don’t, your competitor would be more than happy to show them gratitude.”

During lower transaction volume periods, McGovern said title agents should avoid just going through the motions.

“When the economy seems unkind to home sales, lots of title agents put their heads down and ride it out,” she said. “Don’t be one of them. Home sales are not the only thing you should be measuring right now. Market share is key in a time like this. Just because your competition is asleep at the wheel doesn’t mean you should be. Instead, use the down time to bolster the sales side of your business.

“The members of your sales team are not the only ones who should be selling your company and your services. Every single person in the company should have ‘sales’ as a requirement of the job.”

— Dr. Cindy McGovern,  
Orange Leaf Consulting CEO

“We’re all competing for a bigger piece of a smaller pie. In a tight economy, go after market share. Steal market share while everyone is just riding out the storm. There will never be absolutely no houses to sell. Grab the ones you can.”

**Darryl Turner**, CEO  
of The Darryl Turner

Corp., said creating a sales culture means ensuring that team members know their respective roles and act on them.

“This means having a dedicated person or persons who know and perform the primary responsibility of their role,” he said. “The primary responsibility of their role is to ‘convert’ customers to their company. This means that they are to facilitate the function of moving Realtor, lender, builder customers ‘from’ another title company ‘to’ their title company.”

Turner said the key to this element is to realize that without conversions, the title company does not possess a sales process or model.





"You also need to realize that marketing is not sales," he said. "This includes social media. Advertising gets people to see you or your company. Marketing gets people to know your company. Sales gets people to start doing business with your title company. To rely on marketing-related functions as a way to grow your customer base is significantly ineffective. Marketing is strictly a lubricant for your sales process and should never be relied upon as a means of generating customers by itself."

Investment in title industry-specific sales training and coaching is another step to sales optimization, Turner said.

"Sales is not a numbers game, it is a science," he said. "Salespeople are not born, they are built."

To best prepare staff members, Turner said it's critical to make sure they understand the definition of succeeding. He characterizes this as knowing total order count and total revenue is not a measurement of success.

"A growing active customer base is the only acceptable measurable to use to determine sales success," he said. "If you are not growing the number of customers that are directing you orders each month, you are not having sales success."

"Everyone was an expert in 2021," he said. "In other words, the total volume of business caused the seduction of false thinking of title agents and salespeople. The high volume made them think they were doing an amazing job. It fooled many."

Turner said the question that should have been asked inside every title company in 2021 was, "Are we growing our active customer base?" He said many businesses did not fully grasp shortcomings in this area until mid-2022.

Setting proper sales goals for your team won't be as beneficial as possible without effective measurement of those goals, Turner added.



"Determine the cost of having each sales rep," he said. "Compare the cost of the rep to the revenue only resulting from the first five transactions from only the new customers that particular rep brought on. Do not value or track your rep by the total volume from customers assigned to them."

"This means a rep costing \$6,000 per month must bring in \$6,000 in new money that month at a minimum. If your average fee per file is \$2,000, that rep must bring in three additional transactions from new customers."

Turner said staff compensation packages need to be put together in a way that incentivizes sales.

"The title industry is very good at paying people in sales positions enough to live on without ever having to sell anything," he said. "This is the epidemic industrywide when it comes to salespeople. Keep in mind that no more than 50 percent of their compensation package should come from a base salary or draw. Pay a reasonable base. Not enough to live on without performing. Pay a rate of commission on retained business. Pay three to five times the commission rate on orders one through five from a new customer."

## Bold design, changing with the times vital for title websites

Title industry websites are no longer limited to serving strictly as digital billboards or client communication portals. They have become the de facto Swiss army knife as new tech has infiltrated all corners of the business.

Bowe Digital President and CEO **Wayne Stanley** said designing a website that “tells a company story” and maintains a consistent human element will help your business stand out from the pack.

“People often forget to include pictures of your team, your office space and your community on a new website,” he told *The Title Report*. “However, we see that the human factor is typically the title company’s biggest competitive advantage.

“A common mistake that title companies make in the website process is not focusing enough on content,” he added. “The content of your site is important to set you apart but also to ensure you’re easily found through Google search results. People focus on the function of a site, and they love the design process, but spend too little time on their content.”

Highlighting your business’ services and specialties is also essential, he said.

“I think one of the biggest things a title company should do on their site is ensure they include content highlighting all the various types of real estate transactions they can help serve,” Stanley said. “Don’t simply put ‘residential and commercial.’ Be specific. A few other specific needs would be a map of your office or closing locations, a video on your page and ensuring your site loads quickly. All those things feed into your Google search results.”

Stanley advised not letting the competition dictate what tools and services are added to your website. Instead, let your customers’ habits be that barometer.

Keeping up with clients’ definition of “user-friendly” is an increasingly tall task for website designers, as new features and interfaces are introduced across all Internet sectors on a daily basis.

Many title insurance websites have incorporated online ordering and tracking systems, allowing customers to request title searches and insurance policies online. Users can track the progress of orders in real-time, enhancing transparency and convenience.

Chatbots like ChatGPT and virtual assistants can provide instant customer support and answer common queries, which paves the way for human employees to handle more complicated matters.

“The role of websites for title companies is to connect someone with their human team,” Stanley said. “The title industry differs from others because our websites don’t convince a person to give them business. Most title company websites are a jumping point for connecting to a human on the team to complete a real estate transaction. That said, sites are getting smarter and more user-friendly in their ability to connect visitors to the title company’s team.

“For example, people are doing more to showcase their team on their websites, so you know who you’re reaching out to. Also, we’re seeing more chatbots and other automation tools be implemented to get a website visitor to their end solution (or contact) faster than ever before.”

Title industry websites also are featuring more educational resources, which can range from articles and FAQs to video tutorials, access to specialized training programs and more. Some businesses are giving clients online access to real-time calculators to get exact totals for closing cost estimates, title premiums and other



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expenses.

"I think websites in the title industry will continue to adapt and evolve to better serve the people visiting them," Stanley said. "I imagine the rise in automation and AI (artificial intelligence) will continue to improve the experience on the site while also decreasing the workload of the title agent—whether that's through sales, online order entry or even post-closing.

"I think we'll see more automation in title websites before we see more of the AI component. Automation for taking online title orders, communication with Realtors and investors and post-closing assistance will likely be the first wave of broader adoption."

Stanley said bolder website designs are a recent title industry-specific innovation that stands out to him.

"People are being bolder with their site designs, using video and relying on broader web trends to make sites that, dare I say, aren't so boring to our industry," he said. "It's refreshing to see the use of color, art, movement, video and more creativity for these companies. The title company and industry have always been full of life, and it's great to finally see that reflected in their digital presence."

**Andrew Bash**, website and production director at Ohio-based M2J Marketing, said clients will ultimately dictate what direction title industry websites go over the next decade.

"We aren't going to start spending less time on our phones and computers, so a good website will only continue to be more important,"

he said. "Depending on the business and customer base, this can mean different things; some businesses may want their site to provide a base level of information and encourage visitors to reach out for a personal connection; others might want to provide a fully online experience from start to finish. Knowing your clientele, and the strengths of your business, is key to crafting the right online experience."

Some title websites use client data to provide personalized experiences. This could involve displaying relevant content, recommended services, or tailored offers based on user preferences and browsing behavior.

"With people spending so much time on their phones, mobile accessibility is more important than ever," Bash said. "Visitors and potential customers want information fast and will likely bounce if they have to spend more than 10 seconds looking for something.

"Local information is key for title and real estate businesses. It provides proof to potential customers that you are suited to fit their needs and allows you to better compete in search."

Like Stanley, Bash said bold and clear design is a simple but often overlooked aspect of an optimal title website.

"A modern, clean design, with clear navigation and calls to action that take the users to the information they are looking for, is very important," he said. "After that, high quality imagery with real people/places (not stock if you can help it). Too many businesses use a template and end up with a cluttered, boring

"People are being bolder with their site designs. ... The title company and industry have always been full of life, and it's great to finally see that reflected in their digital presence."

— **Wayne Stanley**,  
Bowe Digital President and CEO





website that doesn't represent their brand."

Bash added that AI is already allowing marketers to develop more complex and sophisticated websites.

"This will effectively raise both the 'floor' and 'ceiling,'" he said.

"More people will be able to have websites by using AI tools to help them build it – but the ones who best understand how to use the tools, and don't neglect the human element, will quickly rise to the top."

More websites are giving users access to virtual home tours and mapping as well as client portals that display transaction details, documents and real-time progress updates. Some businesses have made attempts at integrating communication such as email, messaging and appointment scheduling into

one centralized hub on their websites.

Tailoring content to specific geographic regions is also cited by experts as vital in keeping up with clients' needs as well as state-by-state regulation and market trends.

Demonstrating transparency through the display of customer reviews has been shown in title and nearly every business sector as means to building customer trust and cementing a website as a client need.

"More businesses in the title/real estate space are recognizing the importance of an online presence that you own," Bash said. "Trulia, Zillow, Houzz, and others are certainly important, but the best way to build brand loyalty and generate quality leads is by effectively utilizing a website that is customized to your specific brands and fulfills your specific needs."

## 'Radical candor,' 'humanizing your company' keys to social media success

Everyone has a social media presence these days, but what does it take to distinguish your title business as an innovator and reap the ensuing benefits?

**Jaime Kosofsky**, founding partner and executive vice president of business development and compliance at law firm Brady & Kosofsky, said he's never been one to follow industry norms when developing a social media strategy.

"I started my LinkedIn experience in 2007 and I have pounded it every day for 15 years," he told *The Title Report*. "I also have a couple of Facebook accounts, one for my personal world and one for my residential real estate Realtor-based closing business. I have found my national clients like LinkedIn and my Realtors like Facebook."

To stand out from the crowd, don't write a social media post just for the sake of writing a post, Kosofsky said.

"If I post something on LinkedIn, I am trying to achieve something specific. It may be marketing, or I could be trying to educate the industry on something. One thing is certain – no filter, no grammar check, no ghost writing. If it's from me and it's online, I wrote it.

"I try and use a little shock factor every now and then or sarcasm when necessary. What is important to me is that the reader understands the topic. I may step on toes, or my opinion may not be popular, but if I wrote it, then I believe it."

Social media communication retains its usefulness even when telling stories about



overcoming difficult situations, he said, and can serve as a precautionary roadmap for users.

"In 2019 when my office burned down, I used LinkedIn to chronicle the disaster and recovery," he said. "In 2020 I used it as a communication and COVID education center. I got hit with fraud in September 2023, and I used it to get the message out, and tell people what to look for."

Using plain English, "radical candor" and plenty of pictures also were stressed by Kosofsky as invaluable for successful social media campaigns. Title companies and real estate stakeholders are increasingly using video content to showcase properties, explain business nuances, share customer success stories, and provide virtual tours.

Live videos, VR 360-degree videos, and video testimonials are also being used to better connect with clients.

Interactive content such as polls and quizzes are becoming more popular on social media platforms, whether that's coming from title companies or anyone with an online presence. According to experts, this type of content engages users, encourages interaction and provides valuable insight into customer needs.

Blog posts, infographics and video explainers for the buying or selling process have also been used as part of the "radical candor" mentioned by Kosofsky.

He said he fears artificial intelligence (AI) and automation could take a lot of the person-to-person and business-to-business creativity out of social media.

"I think AI has blunted much of the innovation and advancement of social media," Kosofsky said. "I spend more time filtering out the garbage than I do writing these days. Anyone can go to ChatGPT and write a dissertation on the use of predictive analytics in the searching of public records, even if they have never seen a search in their life. I want to hear about this type of thing from someone who has done the search manually and is then using predictive analytics.

"AI takes the emotion and personal touch and flavor out of the post. I love AI for use in operations, and day-to-day production tasks in the business. But I feel that AI has blunted the cutting edge of social media, because of all of garbage automated messaging and emails. I really do not like the use of it for social media, and I rarely use it."

Many firms encourage clients to submit their own content and testimonials, sharing their experiences with title insurance claims, title searches or other real estate business matters.

Collaborating with real estate influencers or local community figures has helped countless title companies reach new audiences and build relationships. Influencers on essentially any platform can provide insight, recommendations and reviews to strengthen branding.

Kosofsky said social media has been "the lifeblood of his business" from the moment it entered the national spotlight.

"I use it to learn what my colleagues are seeing in our industry and in others," he said. "I also use it to see hiring trends and movements within the industry. I use it to see how tools in other

**"Anyone can go to ChatGPT and write a dissertation on the use of predictive analytics in the searching of public records, even if they have never seen a search in their life. I want to hear about this type of thing from someone who has done the search manually."**

**— Jaime Kosofsky,  
Brady and Kosofsky Founding Partner**



industries may be used in ours. It's my source of business intelligence."

**Sabrina Bier**, director of digital media and education at Proper Title, LLC, said changing social media trends for businesses are often the product of the impact social media has had on society.

"Ten years ago, the best practice for growing your business was word of mouth referrals, but now we are surrounded by so much information," she said. "The human brain doesn't function the same – our attention span is shorter. Utilizing social media often and consistently keeps you front of mind for your clients and customers."

She said a common mistake made by businesses in building their social media is simply overthinking it.

"Businesses spend too much time getting ready to get ready," she said. "They think they need to spend hours creating a plan and content. All you need to start is to block off 30 minutes twice a week – use this time to post and engage. Posting is very important but so is engaging – slow down the scrolling and comment on people's posts that you want to build relationships with."

Webinars, virtual open houses, and online workshops via social media have proven popular with businesses and clients, providing valuable information on real estate trends, market updates and title insurance essentials.

Instead of focusing solely on one platform, companies are generally adopting a multi-platform approach to reach a wider audience. This includes the use of Facebook, TikTok, Instagram, LinkedIn, X/Twitter and even emerging platforms like Meta's Threads.

"Historically, we are at least an 80 percent relationship business and I don't see that changing," Bier said. "Therefore, we need to use social media to humanize our company and be a relatable solution to our clients. The social media follower needs to feel they know you and can

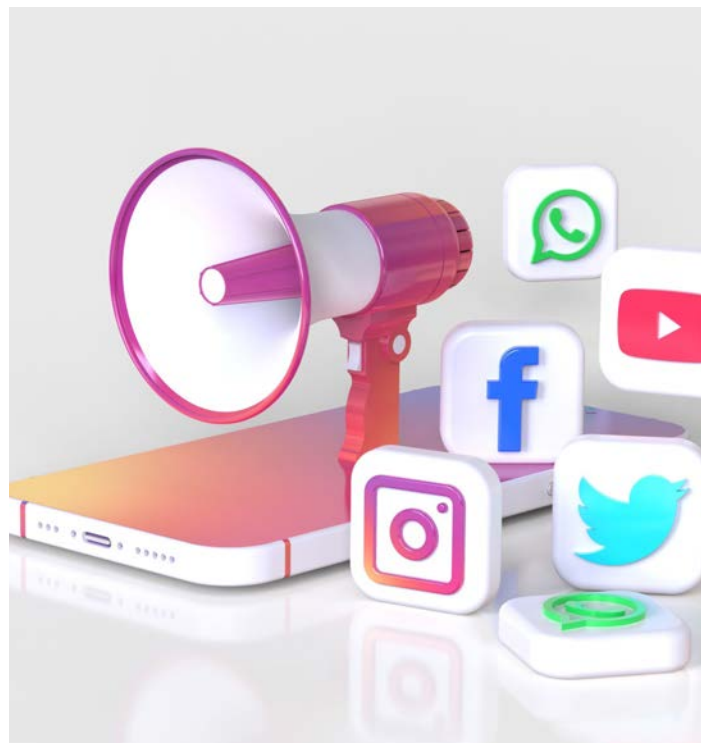
call you. It is a great way to keep the momentum in the relationship."

"Have a 'face' to your company – a person who will post consistently. Know your target market (your audience) and their pain points that you can solve. Number one, make sure people know what you do and why they need you."

Despite any pitfalls, Bier said AI will be a monumental part of social media moving forward.

"With the increased use of AI and mobile applications, people will continue to engage, network and build relationships online more often and more efficiently," she said. "The 'followers' will be engaged instantly and it will feel authentic. The more automated our industry becomes the more engaging social media will become."

"Some companies will be left behind. You can create content so fast with the use of AI tools that some of us will pump out content consistently and audiences will forget about the other companies because they don't hear about them. The response will be, 'Oh, you're still in business?'"





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