TITLE 360

INTEGRATED CRM FOR THE TITLE INDUSTRY BY TOKARA SOLUTIONS

1. **Lead Generation**

Gather leads from a tradeshow, event, or lead forms

2. **Initial Marketing Outreach**

Initiate marketing efforts through email campaigns and follow-ups to generate business

3. **Lead Conversion**

Once a transaction occurs, convert leads to view all activity with the referral source

4. **360-Degree View into Contacts and Transaction Milestones**

Achieve 360-degree views into contact transactions, referral sources, and milestones on their transactions within Title 360 CRM

5. **Reporting and ROI Analysis**

Generate reports and view campaign logs to understand which campaigns are generating the highest ROI

6. **Post-Transaction and Relationship Management**

Identify which contacts are providing the most sources or have decreased in volume, and market directly to them

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Understanding Business Workflows with Title 360 CRM

Title 360 serves as a comprehensive CRM platform designed specifically for Title companies to address their entire workflow from Sales and Marketing through Escrow. With its powerful lead management, reporting tools, and ROI functionality, Title 360 helps title companies streamline their sales operations from lead generation to post-transaction follow-up. Our CRM solution helps you achieve 360-degree views into relationship profiles and history of your clients and referral sources by putting Qualia and Resware data at your fingertips with a comprehensive integration of key data.

Lead Generation

Title 360 helps you efficiently capture leads from multiple sources, including trade shows, marketing events, and lead forms. With all this data centralized in one platform, you can ensure that no lead falls through the cracks and that each opportunity is recorded and ready for nurturing.

Initial Marketing Outreach

Once leads are captured, creating marketing campaigns and automated workflows directly within Title 360 to nurture these leads and keep your company top of mind. This streamlined marketing process ensures consistent communication with potential clients, helping turn leads into revenue-generating opportunities.

Lead Conversion

Title 360 allows for an easy conversion from a lead to a contact once a deal is made. This conversion ensures that all activities related to the referral source are stored in one place, allowing your team to have a complete overview of all interactions, making future follow-ups and relationship management easier and more efficient.

360-Degree View into Contacts and Transaction Milestones

Title 360 provides a comprehensive view of all your client transactions, referral sources, and key milestones throughout the transaction process. This 360-degree visibility ensures that your team is always informed and equipped with the data needed to enhance customer service, track performance, and improve sales efficiency.

Reporting and ROI Analysis

With Title 360's built-in reporting tools, you can easily generate reports to evaluate the success of your marketing campaigns. By tracking the performance of each campaign, you can optimize your marketing budget and focus on the initiatives that yield the highest returns. Moreover, ROI analysis helps you fine-tune strategies for sustained growth.

Post-Transaction and Relationship Management

Post-transaction relationship management is key to building long-term success. Title 360 makes it easy to track referral sources and identify which partners and clients provide the most sources, or have decreased in volume. With this information, you can tailor your marketing efforts and strengthen relationships with key referral partners, driving more business your way.