



CRM Essentials for Title Agents

Understanding and Leveraging CRM for Success

Dean Collura & Matthew Defrain, TitleTap by ProfitSolv

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Stavvy



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Sr. Account Executive

What is a CRM?

Customer Relationship Management (CRM)

is a technology for managing all your company's relationships and interactions with customers and potential customers.

Purpose: To improve business relationships, streamline processes, and enhance profitability.



Why is a CRM Important?



Centralized Data: Keeps all customer information in one place.



Improved Customer Service: Provides better support and personalized service.



Increased Sales: Helps manage sales pipeline and close deals faster.



Enhanced Communication: Facilitates better internal and external communication.

What Kind of Businesses Need a CRM?



- **Small to Large Enterprises:** Any business that interacts with customers.
- **Sales Teams:** To track leads and manage sales processes.
- **Customer Service Teams:** To provide efficient support.
- **Marketing Teams:** To manage campaigns and track customer interactions.

Use Cases

- **Eliminate the stack of business cards with sticky notes**
- **Anything you are tracking in spreadsheets**
- **Start and track next steps**
- **Look up history and account ownership**
- **ROI and Focus**

Challenges When Using a CRM



User Adoption: Getting team members to use the system consistently.



Data Quality: Ensuring data is accurate and up-to-date.



Integration: Integrating CRM with other systems and tools.



Customization: Tailoring the CRM to fit specific business needs.

Benefits of Using a CRM



Better Customer Insights: Understand customer needs and behaviors.



Increased Efficiency: Automate routine tasks and processes.



Improved Collaboration: Share information easily across teams.



Enhanced Reporting: Generate detailed reports and analytics.

Top Best Practices When Using a CRM



Training: Provide comprehensive training for all users.



Data Management: Regularly update and clean data.



Customization: Customize the CRM to fit your business processes.

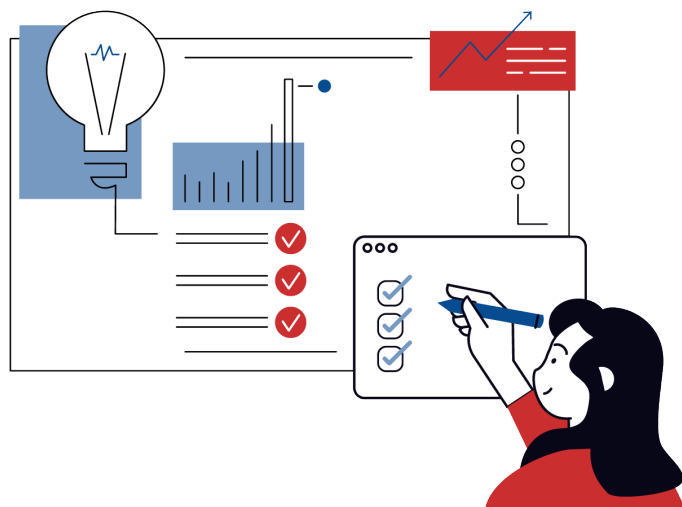


Integration: Ensure seamless integration with other tools.



Continuous Improvement: Regularly review and optimize CRM usage.

Things to Consider When Choosing a CRM



- **Ease of Use:** User-friendly interface and navigation.
- **Scalability:** Ability to grow with your business.
- **Customization:** Flexibility to tailor the CRM to your needs.
- **Integration:** Compatibility with existing tools and systems.
- **Support and Training:** Availability of customer support and training resources.

Demo

EMMA L. PETERSON
ATTORNEY

401.331.6300
800.544.9144



321 S MAIN ST #200
PROVIDENCE, RI 02903

CCK-LAW.COM
epeterson@cck-law.com

Intake Form URL

Lead Source

Branden Brooks



Lead Status

New Lead



Link



<https://titletap.lawruler.com/QuestionCodeE.aspx?for...>

Generate New Link



Save

Close



NEW CLIENT INFORMATION SHEET - TitleTap

Marketing Event A

General Info

1. Full Name *

(First Name)

(Middle Name)

(Last Name)

2. Cell Phone

3. Primary Email

4. What is your Business' Name

5. Are you liking the event?

Yes

No

6. License Number

Submit

New Inquiries **NEW**

Text Messages **NEW**

FIRST NAME	LAST NAME	STATUS	PHONE	SELLER NAME:	BUYER NAME	LOAN AMOUNT	LENDER	SALES PRICE	STREET ADDRESS:	CITY:	ZIP	LEAD CREATED DATE	CLOSED DATE
Matthew	Defrain	New Lead	C (561) 287-0970	—	—	—	—	—	—	—	—	02/25/2025 3:08 PM	—

Matthew Defrain | Marketing Event A | New Lead

Created: Feb 25, 2025 3:08 PM Lead # 53

Vitals
License Number 1234fake

Action Menu

Description

Contact Information

Contact Name
Matthew Defrain

Primary Phone
(561) 287-0970

Primary Email
titletap@titletap.com

Address
No address exists in this contact

Language English **Local Time** 3:11 PM (EST)

Contact Preference None **When to Contact** Unknown



Upcoming Events
No Upcoming Events

Tasks 0 + Add Task

Type Category

Filters Incomplete Tasks Completed Tasks

Search Export

Due Date ↑	Subject/Description ↑	Task Type ↑	Assigned By ↑	Assigned Date ↑	Status ↑	Priority ↑	
02/25/2025 11:59PM	Confirm all client info and lead source is correct. Set lead source from what was placed in the notes/description.	To Do	System	02/25/2025 03:08PM	Active	Standard	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Show 10 entries

Mark task as finished

Are you sure you want to mark the task as finished?

Vitals
License Number **1234fake**



Action Menu ▾

Staff

Assignee: Unassigned ▾ Owner: None ▾ Attorney: None ▾

Intake/Case Info ⓘ

Form Settings

Print Form

Display Form Link

Send Form

General Info

1. Full Name

Matthew (First Name) Defrain (Last Name)

2. Cell Phone

(561) 287-0970

3. Primary Email

titletap@titletap.com

4. What is your Business' Name

Title company 1

5. Are you liking the event?

- Yes
- No

Thanks! Please submit to continue

6. License Number

1234fake

- Launchpad
- Dashboard
- Inbox
- Agenda
- New Intake
- Advanced Search
- New Inquiries
- Text Messages **NEW**
- Tasks
- Calendar Events
- Newsfeed
- Contacts
- Reports
- Documents
- Automations
- Email Marketing
- Setup

NEW LEAD 4

ID 53
Marketing Event A
Matthew Defrain
02/25/2025 3:08 PM

ID 50
Marketing Event A
branden Brooks
01/09/2025 10:04 AM

ID 52
Title Agents
Chris De la garza
01/29/2025 2:10 PM

ID 49
Calc - Orders
John Smith
11/21/2024 5:20 PM

INTAKE QUESTIONNAIR... 0

SCHEDULED APPOINTM... 0

RESCHEDULE REQUEST... 0

branden Brooks | Marketing Event A | New Lead

Created: Jan 9, 2025 10:04 AM Lead # 50

Vitals
License Number



Action Menu

E Mails | Texts































Print to PDF



Compose Email









Copy the Code to Auto-Import 3rd Party Emails (For this Client Only)

Search

	Date	From	To	Cc	Subject	Status	Campaign/Type
  	Feb 24 2025 2:13PM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event A Lead/Intake 50	delivered	Notification Center
  	Feb 1 2025 12:28PM	notifications@law.lawruler.net	Dean@titletap.com		Text Message branden Brooks, Marketing Event A Lead/Intake 50	delivered	Notification Center
  	Jan 31 2025 1:58PM	notifications@law.lawruler.net	Dean@titletap.com		Text Message branden Brooks, Marketing Event A Lead/Intake 50	delivered	Notification Center
  	Jan 31 2025 1:14PM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center
  	Jan 30 2025 9:07AM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Title Agents Lead/Intake 50	delivered	Notification Center
  	Jan 27 2025 4:23PM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center
  	Jan 27 2025 4:23PM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center
  	Jan 27 2025 4:17PM	notifications@law.lawruler.net	cody.pearson@profitsolv.com		New Note branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center
  	Jan 16 2025 10:46AM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center
  	Jan 16 2025 10:46AM	notifications@law.lawruler.net	Dean@titletap.com		Task Updated branden Brooks, Marketing Event Lead/Intake 50	delivered	Notification Center

Notes/Voice Memos
[Print to PDF](#)
[Record a Voice Memo](#)
[Add Note](#)

Category

Date ↑ ↓	User Name ↑ ↓	Category ↑ ↓	Notes	
01/27/2025 04:15 PM	Law Ruler Support	No Category	@Cody Pearson spoke with Cody	   
01/16/2025 04:28 PM	Law Ruler Support	Administrative	spoke with branden	   



Activity Log
 Category

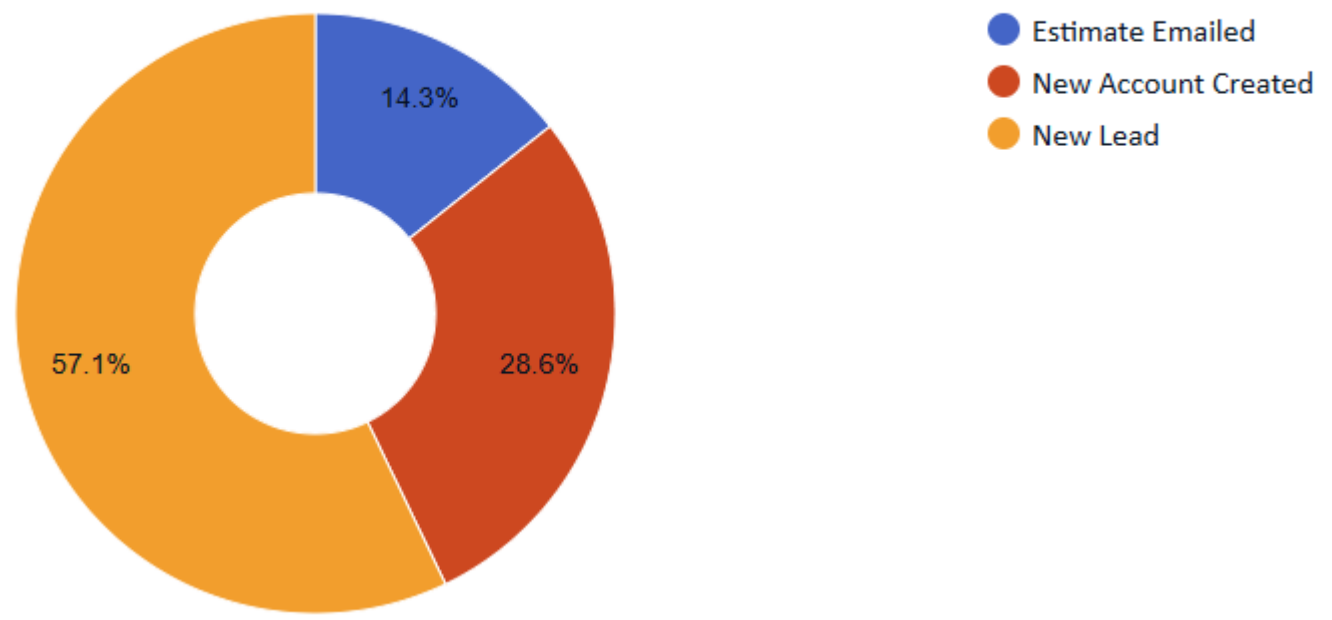
Completed On	User Name	Activity Description
02/24/2025 02:13:44 PM	System	Email Status to user : delivered
02/24/2025 02:11:54 PM	System	The Task: Call & Email was created for the 1st Follow Up milestone
02/24/2025 02:11:54 PM	Law Ruler Support	The 1st Follow Up milestone step has been started
02/24/2025 02:11:54 PM	Law Ruler Support	The Milestone step changed from Confirmation to 1st Follow Up
02/24/2025 02:11:53 PM	Law Ruler Support	Law Ruler Support completed the task: Confirm all client info and lead source is correct
02/01/2025 12:28:21 PM	System	Email Status to user : delivered
02/01/2025 12:27:10 PM	Dean Collura	branden Brooks replied via SMS Text Message from: (561) 666-9098 to: (929) 431-1170 Message: 'Whats You need'
01/31/2025 01:58:22 PM	System	Email Status to user : delivered
01/31/2025 01:56:33 PM	Dean Collura	branden Brooks replied via SMS Text Message from: (561) 666-9098 to: (929) 431-1170 Message: 'Hi send me a recent selfie of you and your name'
01/31/2025 01:17:05 PM	Law Ruler Support	SMS Text Message has been sent to (561) 666-9098 by Law Ruler Support: hi! SMS Status: delivered
01/31/2025 01:14:26 PM	System	Email Status to user : delivered
01/31/2025 01:14:10 PM	System	The Task: Confirm all client info and lead source is correct was created for the Confirmation milestone
01/31/2025 01:14:09 PM	System	Task "Confirm all client info and lead source is correct. Set lead source from what was placed in the notes/description." was removed due to milestone changes.
01/31/2025 01:14:09 PM	Law Ruler Support	Law Ruler Support applied the last milestones settings to the current lead(case). Old version 2, new version 7.
01/31/2025 01:14:09 PM	Law Ruler Support	Lead Case Type changed from Title Agents to Marketing Event
01/30/2025 09:07:37 AM	System	Email Status to user : delivered
01/30/2025 09:06:21 AM	System	The Task: Confirm all client info and lead source is correct was created for the Confirmation milestone
01/30/2025 09:06:21 AM	System	Task "2nd Call & Email. Change to this status: "Status 2" or Use This Template: or change status to "This Status" Hi There...." was removed due to milestone changes.
01/30/2025 09:06:21 AM	System	Task "Call & Email. Change to this Status: "Status 1" or Use This Template: Hello..." was removed due to milestone changes.
01/30/2025 09:06:21 AM	System	Task "Confirm all client info and lead source is correct. Set lead source from what was placed in the notes/description." was removed due to milestone changes.
01/30/2025 09:06:21 AM	Law Ruler Support	Law Ruler Support applied the last milestones settings to the current lead(case). Old version 7, new version 2.
01/30/2025 09:06:21 AM	Law Ruler Support	Lead Case Type changed from Marketing Event to Title Agents

Run Report **Export/Schedule Report**







Funnel Metrics ? [Edit Dashboard Category](#)

Lead	Prospects	Clients	Referred	Rejected	Closed
6	3	2	0	0	0

Total Leads by Status



Sent	Viewed	% Viewed	Clicked	% Clicked
0	0	0%	0	0%

Email Campaign Name	Date/Time Edited	Date/Time Sent	# of Recipients	Sent	Viewed	% Viewed	Clicked	% Clicked	
test	10/30/2024 3:48:05 PM		0	0	0	0%	0	0%	  
Test	10/17/2024 10:07:33 AM		0	0	0	0%	0	0%	  

Newsfeed

Search by name, id, numbers, ...

Filters

50 - branden Brooks - Law Ruler Support	02/25/2025
Law Ruler Support deleted the file: KMS DOC.pdf	03:18:44 PM
53 - Matthew Defrain	02/25/2025
The Task: 2nd Call & Email was created for the 2nd Follow Up milestone	03:11:59 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
The 2nd Follow Up milestone step has been started	03:11:59 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
The Milestone step changed from 1st Follow Up to 2nd Follow Up	03:11:59 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
Law Ruler Support completed the task: Call & Email	03:11:59 PM
53 - Matthew Defrain	02/25/2025
The Task: Call & Email was created for the 1st Follow Up milestone	03:11:55 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
The 1st Follow Up milestone step has been started	03:11:55 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
The Milestone step changed from Confirmation to 1st Follow Up	03:11:55 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
Law Ruler Support completed the task: Confirm all client info and lead source is correct	03:11:55 PM
53 - Matthew Defrain - Law Ruler Support	02/25/2025
The answer to the question "Are you liking the event? (Custom503)" was updated to "Yes" by the lead	03:08:47 PM

Tasks +

There are no Entries.

Go to Tasks

< 1

Help Center

Events +

User Any User

No Upcoming Events at this time.

Schedule a CRM Demo

www.titletap.com/titletap-crm

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