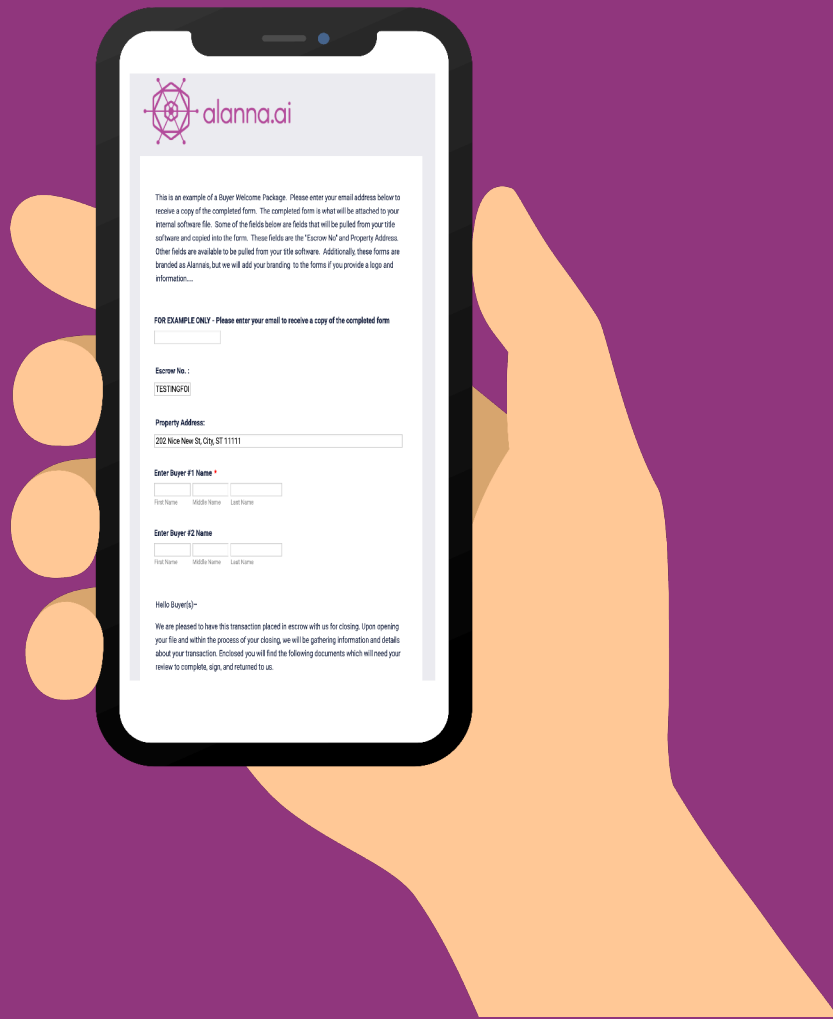


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# Alanna Smart Forms Take the Work Out of Data Entry



# INTRODUCTION

This eBook explains how Alanna Smart Forms can reduce manual data entry to help your employees work more efficiently.

Rarely is there a time when title company employees aren't busy. But much of the time they are busy with tedious tasks like entering data, emailing clients, and answering phone calls. While these are necessary tasks, they can easily be offloaded when you automate certain processes. That's where Alanna enters the picture.

With Alanna Smart Forms, employees no longer have to spend hours each week entering data manually. Once your clients provide information in the forms and click submit, the information and resulting documents are automatically uploaded into your title production system. This reduces the risk of errors and frees up employees for more important tasks. That's one of Alanna's specialties!



## Chapter 1

# How Alanna Smart Forms Work

Any time the word automation is thrown around, people get skeptical. This goes for both the average person as well as title company employees. No one wants their job to get replaced by a robot, and clients usually prefer interacting with a human instead of a computer. The good news is Alanna provides the best of both worlds. Here are some of the many ways Alanna provides exceptional customer service from the beginning of your business relationship through closing day. Sometimes the most stressful part of a title company employee's job is collecting documents and information from buyers, sellers, and real estate agents. Many times constant reminders are required and forms aren't received until the last minute. A great way to streamline the closing process and make document collection a breeze is to implement Alanna Smart Forms. Here's how they work.

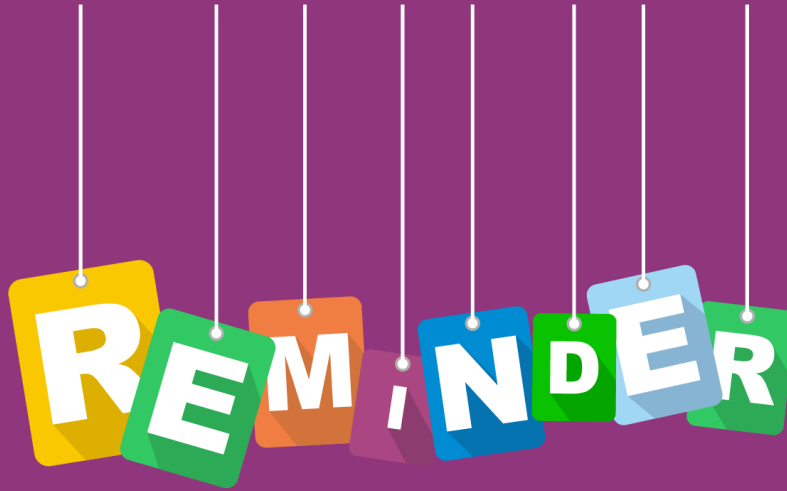
# Streamlined Delivery Of Smart Forms



When you upgrade your title technology to Alanna Smart Forms, each form will be sent via text or email as a unique URL based on the recipient. So if the recipient is a buyer, the Buyer Info Sheet Form will be provided as a link with all of the basic information pre-populated. Since Alanna is integrated with your title production system, a lot of the basic information like the person's name and contact information can be pre-populated.

## Smart Forms Keep The Closing Process On Schedule

When the recipient fills in the information and submits it, the forms will automatically upload into the title production system. At that point, a notification email is sent to the title company so they can take the next steps. This is essential in keeping the closing day on schedule so employees don't have to constantly check whether forms have been returned.



## Automated Reminders Remove Burdens From Title Company Employees

Alanna can be configured to send reminders on certain forms if needed. So if you don't receive a particular form from a client during a certain timeframe, Alanna will automatically send them a reminder so you don't have to. And when a reminder is sent, the client can ask questions if they have any and Alanna's conversational AI abilities can provide the answer.

## Set Your Title Company Apart From The Competition With Alanna Smart Forms

**Dynamic forms can set your title company apart since further questions can populate based on the answers clients provide. Forms can also be adjusted based on the type of client and the unique transaction. And when it comes to reminding clients, your employees can create specific outbound messages or include specific links before the reminder is sent. All of these features of Alanna Smart Forms are sure to set your title company apart from the competition and streamline your processes of gathering client information.**

## Chapter 2

# Automate Info Sheets with Alanna Smart Forms

Collecting information from real estate agents, buyers, and sellers, can be a challenging process. But what makes it most challenging usually is having to print, scan, and fax forms. Then all of the data must be manually entered into your title production system. Alanna's Smart Forms can be the updated title tech tools your company has needed for a long time. Here's how you can automate information collection and keep closing days on schedule much easier.

# Outdated Processes Can Delay Closing Day



If your title company still emails documents to clients for information gathering and their signatures, your title tech tools should be updated. These outdated processes can lead to delays when clients don't have access to a printer or a scanner. And then you have to remind them about the documents and hope everything is filled out correctly when you receive them. This puts unnecessary stress on the staff of a title company when Alanna Smart Forms can easily remove this burden.

# Customized Smart Forms Increase Efficiency

With Alanna's customized Smart Forms, it's like having an assistant generate new forms for every client. Alanna creates the specific form based on the information needed, including disclosures and agreements the recipient must acknowledge. Even more complex documents like Payoff Authorizations can be generated as a unique form to provide to the seller. This level of efficiency can make closing days much smoother.

# Dynamic Forms Reduce Questions And Streamline Processes

Another benefit of Alanna Smart Forms is they are dynamic. Based on the responses provided by the recipient, the later questions are updated appropriately to streamline the questionnaire. So if a seller indicates there is a joint seller, they can simply select the option and a section will expand to allow them to input the additional seller's information. Each form also includes a signature block where clients can use their mouse or finger to sign.

## Alanna Smart Forms Are Unlike Any Other

With Alanna Smart Forms, you can easily send out forms with your company logo prominently displayed. You can control which fields you would like displayed for clients to fill out as well. Even information like the closer name and contact information can be populated if desired. All of these title tech upgrades can save title companies time and money, which is difficult to do in the real estate industry today.





## Chapter 3

# Reduce Manual Data Entry with Doc Processing

What is one of the most time-consuming parts of a normal day for a title company employee? Most of them will agree manual data entry and the document collection process combine to take the most time. Alanna is known for being the leader in conversational AI, but she can automate other processes to make life easier for title company employees. We've discussed how manual data entry can be reduced significantly with Doc Processing.

# Main Problems With Manual Data Entry



Usually, when title companies receive information sheets back, they are handwritten or not in a format that makes it easy to transfer to the title production system. This forces employees to decide whether to enter the information as they see it or to follow up with the client. And many times clients don't fill in the information correctly, so tracking them down is required. While this is a common problem for title companies, utilizing the right title tech tools can solve it quickly.

## How Alanna Smart Forms And Doc Processing Reduce Data Entry

Alanna's Smart Forms make it easy to gather information through automation. The Doc Processing feature analyzes the information clients input into the Smart Form, and it's sent directly into their files. This saves a significant amount of time compared to manual data entry and helps keep the closing process on schedule.

# Alanna Doc Processing Can Be Used In Two Ways

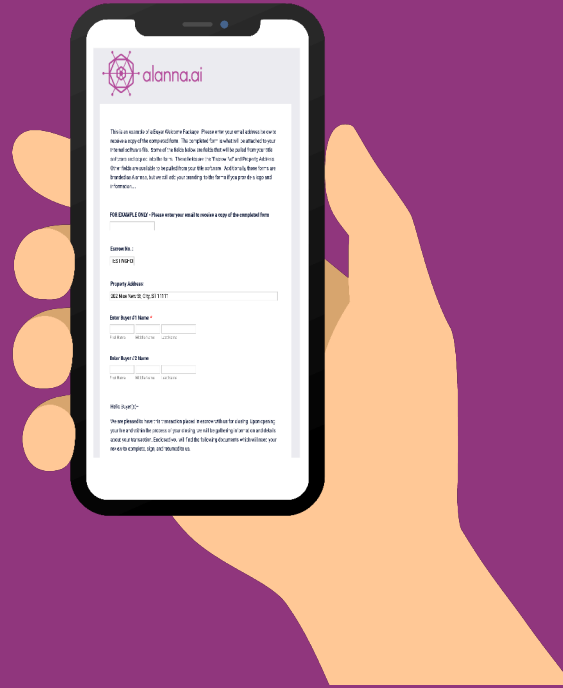
With Alanna's Doc Processing, when a form is submitted and uploaded to your title production system, the information is also submitted to Alanna for verification. The information from the form is then compared to the information currently in the title production system. So if the information has been updated, your team can click a button and the appropriate information will be updated instantly.

Title companies can also utilize Alanna's Doc Processing title tech tools by auto-populating their title production system fields based on form responses. When this is selected, everything is automated so no one needs to review the information. It's the most efficient way to use Doc Processing and keep any closing on schedule.

## Improve Workplace Efficiency And Data Accuracy

Alanna's Doc Processing is simple to set up and the Alanna customer success team will train your staff so you don't have to worry about anything. Alanna's customer success team will work with your internal processes to customize the features you need to ensure efficiency is maximized. If your goal is to improve workplace efficiency while increasing data accuracy, then Alanna's Doc Processing is ready and waiting for you.





# Offload Tedious Work And Elevate Your Employees With Alanna

Title company employees have many skills and they should have an opportunity to let those strengths shine through. When they are held back by having to constantly enter data manually and complete repetitive tasks, they can eventually get burned out. Alanna is the solution to ensure this doesn't happen, while still taking care of your clients. Learn more about how Alanna can elevate your employees by clicking the button below.

GET MORE INFO

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