



Snapdocs for Title

How to Provide an Exceptional Signing Experience and Reduce Costs



OVERVIEW

As the mortgage industry adapts to today's challenging operating environment, Title companies are focusing on three key areas: cost reduction, risk management, and customer experience.

With the Snapdocs Scheduling Platform, Title companies provide high quality signing experiences while eliminating unnecessary cost and risk.



Fill notary orders in under 5 minutes



Access 170k+ notaries



100% statewide notary coverage



Average notary rating: 4.5 stars



Optimize and reduce notary fees



Provide referral-worthy signing experiences



Safely manage PII



Full audit log



Maintain 3rd party compliance standards



98% positive consumer ratings



STEP 1

Increase productivity, team capacity, and operational efficiency

Process more signings at a lower cost-per-transaction

The Snapdocs Scheduling Platform increases productivity and lowers cost-per-signing by:



Automating

processes at every step of the notary scheduling and signing process



Streamlining

operations via TPS integrations



Decreasing

the amount of time staff spends scheduling notaries and managing vendors

Snapdocs will automate the majority of signings, leaving staff the bandwidth to personally handle rush orders and manage other high-value projects. Snapdocs enables Title customers to process more orders faster, all while maintaining control and visibility into the entire signing process.

Snapdocs Title customers are supported by a dedicated Customer Success Team, who advise on how to optimize and reduce notary fees based on market insights, notary network data, and response rate to scheduling orders. When hundreds or thousands of signing orders are processed each month, Title companies are able to see immediate gains in operational efficiency by delivering higher quality signings, faster and easier.



STEP 2

Achieve the highest standards of compliance, data security, and audit-readiness

Maintain vendor and security compliance for your most risk-averse customers

Manual, error-prone workflows, a messy web of multiple vendors, and opaque notary credentials expose Title companies to unnecessary compliance risk. Snapdocs mitigates these risks with a mature, comprehensive notary vetting system and secure document portal.



Notary Quality & Credentials

Title companies gain exclusive access to high quality, vetted, and credentialed notaries. Have specific signing requirements? Narrow your search by filtering for specific notary characteristics.

Gain insights on notary credentials and performance (including notary reviews from clients and borrowers) so Title can choose the best notary to represent them at a signing.



Secure Document Portal

Confidently maintain data compliance, safely manage PII, and abide by critical security protocols using two-factor authentication and data encryption.

Complex or outdated processes, like sharing PII via email or requiring 3rd party encryption vendors, are eliminated with the Snapdocs Scheduling Platform. Participants can securely communicate, preview documents, and share sensitive data all within the Snapdocs platform.



Achieve complete preparedness for audits

With an audit trail for all tasks, transactions, and communications between participants, Title companies remain audit-ready thanks to the unified, compliant document storage built into the Snapdocs Scheduling Platform.

Most Title companies work with as many as 20 notary scheduling partners and platforms. When it comes to preparing for an audit, the time, effort, and resources spent tracking down financial documentation is tedious and costly.

With Snapdocs, Title manages fewer scheduling vendors, allowing staff to avoid the stress and resourcing constraints associated with audit preparation. Moreover, monitoring multiple vendors' risk management practices is unscalable for Title staff and introduces further unnecessary risk for Title companies.

“ The biggest benefit of using Snapdocs as a title company is the ability to get funding corrections back faster, track closings, and have copies of documents back to us within hours.

– **David Silcott** | President at Vantage Point Title

Centralized, streamlined views of scheduling workflows ensure that data is compliant and properly documented. Important tasks don't fall through the cracks thanks to automation and customizable notifications that indicate when tasks are incomplete.

Better yet, both Title and lender stakeholders have visibility into scheduling workflows to further foster trust between closings parties.

Connect with the industry's largest network of qualified notaries

With access to over 170k notaries, Title companies can find the right notary for every signing. The Snapdocs Scheduling Platform helps Title staff maintain control over the entire transaction without having to manually verify notary credentials.



For a more hands-on experience, Title staff can match notary credentials with specific signing requirements, select notaries based on ratings and reviews, or automatically assign preferred notaries for seamless, hands-free scheduling. Notaries securely import and export closing documents to ensure Non Public Private Information (NPPI) is never sent through email, and all critical signing documents are sent to the appropriate party.

STEP 3

Deliver outstanding borrower and client experiences



Meet the SLA requirements of your largest customers

Large customers are naturally risk-averse as they are subject to intense regulatory scrutiny. In order to maintain and improve relationships with these critical customers, Title must uphold thorough risk management and document quality. With notary ratings, credential verification, and notary assignment times under five minutes, Snapdocs helps Title meet and exceed the SLA requirements of their largest lender customers.



Reduce errors and empower customers

The Snapdocs Scheduling platform provides a comprehensive post-closing review process that reduces costly scanback errors and ensures the quality of all closing documents. Document previews and customizable notifications allow customers to feel prepared for their signing appointment. Prior to the appointment, signers can digitally review closing documents and receive automatic confirmation of their appointment, including a picture of the notary, so they know who will be coming, and when to expect them.



Provide referral-worthy signing experiences

Secure and error-free closing documents, clear communication throughout the entire signing process, and an average notary rating of 4.5 stars allow Title to delight customers with every transaction.

“ At Vantage Point Title, it’s important to provide the best customer experience to keep people coming back to us. Snapdocs is giving us a way to reduce costs, increase transactions per scheduler, and improve our customer experience. That’s a win-win.

– **David Silcott** | President at Vantage Point Title



The Snapdocs Scheduling Platform Features



NOTARY OUTREACH

Instant notary outreach upon order creation



NOTARY CONNECT

Schedule a notary directly from a Snapdocs closing



NOTARY AUTO-ASSIGNMENT

Automate notary assignment and appointment confirmation



FEDEX INTEGRATION

Link your Fedex account to auto-generate shipping info



AUTOMATED REMINDERS

Trigger common reminders to borrowers and notaries



CREDENTIAL VERIFICATION

Work with high quality, vetted notaries



TPS INTEGRATIONS

Connect to your existing tech stack



COMMUNICATIONS PORTAL

Centralize all communications



SCANBACKS

Receive documents in preferred format



QC TOOLS

Review and resolve document errors



ANALYTICS DASHBOARD

See valuable insights to improve your business



AUDIT TRAIL

Every activity tracked and logged to ensure compliance



STATUS UPDATES

Know where a signing is in real-time



VENDOR PAY

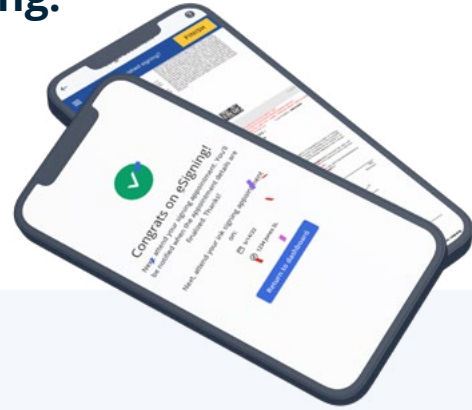
Outsource your notary payments



The Snapdocs Scheduling Platform connects Title to notaries while automating, standardizing, and driving transparency in scheduling.

Chat with a Scheduling Expert to learn more.

[Schedule a Meeting](#)



Founded in 2013, Snapdocs is the mortgage industry's leading digital closing platform. With its patented AI technology and connected platform, Snapdocs is on a mission to perfect mortgage closings for all. Powering millions of closings a year, Snapdocs is leading the charge to modernize, streamline, and improve the mortgage process for lenders, borrowers, and settlement. Snapdocs is the only solution with a proven track record of creating a single, scalable process for every closing. Every day, over 130,000 mortgage professionals rely on Snapdocs to automate manual work and digitize paper processes that plague the industry. Snapdocs is a rapidly growing San Francisco based real estate technology company backed by leading investors including Sequoia, Y Combinator, Tiger Global, F-Prime, Zigg Capital, Alkeon, Wellington Management, Greenpoint Partners, Maverick, Founders Fund, SV Angel, Gokul Rajaram, Lachy Groom, Jack and Sam Altman and Coyne Lloyd. To learn more, please visit snapdocs.com.