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DIGITAL MARKETING

Client Experience Standards for Title Companies

At the heart of every great closing experience is exceptional service. These Client Experience Standards are designed to guide your team in delivering thoughtful, consistent, and meaningful interactions at every stage of the client journey. Inspired by hospitality leaders and refined for the unique needs of the title insurance industry, this guide is a practical tool for elevating your company's brand through service.

1. A Warm and Sincere Greeting

Greet clients by name with a warm, genuine tone. First impressions matter, and your energy sets the tone for the rest of the experience.

2. A Fond Farewell

Always close each interaction—whether in person, by phone, or by email—with a sincere farewell and warm wishes for a successful journey ahead, whether that's a new home, a business venture, or a refinance.

3. Anticipate and Fulfill Needs

Pay attention to client behavior and cues. Whenever possible, resolve questions, concerns, or next steps before the client has to ask. Proactive service builds trust.

4. Escort, Don't Point

When guiding a guest to a location—whether it's the closing table, a meeting room, or a digital form—offer to personally assist them. In person, walk with them. Online, provide direct links and clear instructions.

5. Prompt and Polished Communication

Maintain a high standard of responsiveness:

- **Phone calls** should be answered within three rings. Always ask before placing someone on hold.
- **Emails** should be acknowledged or responded to within **24 hours**.
- **Social media messages** should be treated like text messages—answered promptly during business hours.
Always maintain a friendly, respectful, and solution-focused tone across all platforms.

6. Smile and Make Eye Contact

Whether in person or over video, a smile and eye contact communicate warmth and attentiveness. Let clients feel seen and respected.

7. Own and Resolve Complaints

Take personal responsibility for addressing issues—even if you're not the cause. Apologize sincerely, resolve quickly, and follow up to ensure satisfaction.

8. Professional Appearance Matters

Dress intentionally and maintain a polished appearance. Clients often judge professionalism based on visual cues long before any paperwork is signed.

9. Strive for Daily Improvement

Each day is an opportunity to grow. Reflect on how your service can improve, share insights with your team, and seek feedback from clients when appropriate.

10. Protect Client and Employee Privacy

Handle sensitive information—such as contracts, personal details, and financial data—with care and confidentiality. Trust is your most valuable asset.

11. Be a Team Player

Respect your colleagues. Support them, communicate clearly, and work together to ensure the client experience is seamless from start to finish.

12. Maintain Positive Energy

Clients are often under stress during real estate transactions. Meet that stress with calm, clarity, and an optimistic approach that reassures and stabilizes the experience.

13. Know the Market and Know Your Clients

Stay up to date on local real estate trends, common client concerns, and industry challenges. Recognize and celebrate client milestones—new homes, refinancing wins, or long-term investments. Make clients feel seen and valued.

14. Preserve the Ambiance

Your office, lobby, and closing space should feel welcoming and professional. Be mindful of background noise, personal phone calls, music, and the visibility of personal belongings. Cleanliness and ambiance matter.

15. Be an Ambassador of the Brand

Whether you're with a client or on your personal time, represent the company with integrity. Every action, comment, and interaction reflects on the brand.