

THE 5 BEST TEXT MESSAGE & EMAIL TEMPLATES

TO HELP YOU KEEP YOUR BUYERS,
SELLERS, REAL ESTATE AGENTS &
MORTGAGE PROFESSIONALS INFORMED
DURING THE CLOSING PROCESS

closesimple™

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I was looking for a solution to streamline the process & track the progress of a file for clients. CloseSimple did both."



Shonna Cardello

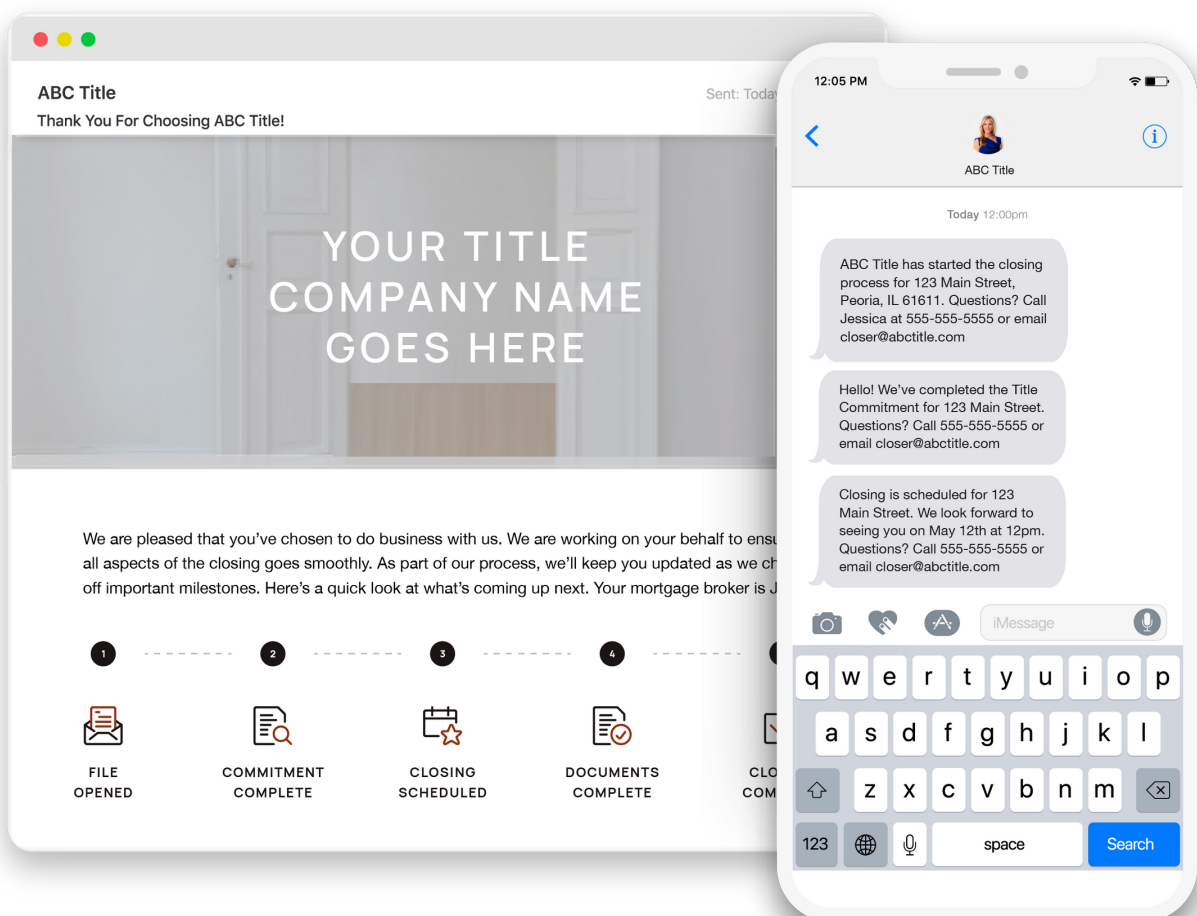
President

White Rose Settlement Services, Inc.

WHY CLOSESIMPLE EXISTS

To proactively communicate the most important steps of the closing process to Real Estate Agents, Buyers, Sellers & mortgage professionals with Automated Text Messages and branded Email updates that feature the Pizza Tracker for Title™.

Any Title or Escrow company can create a seamless closing experience while communicating more efficiently and saving up to 30-60 minutes per file by using CloserSimple.



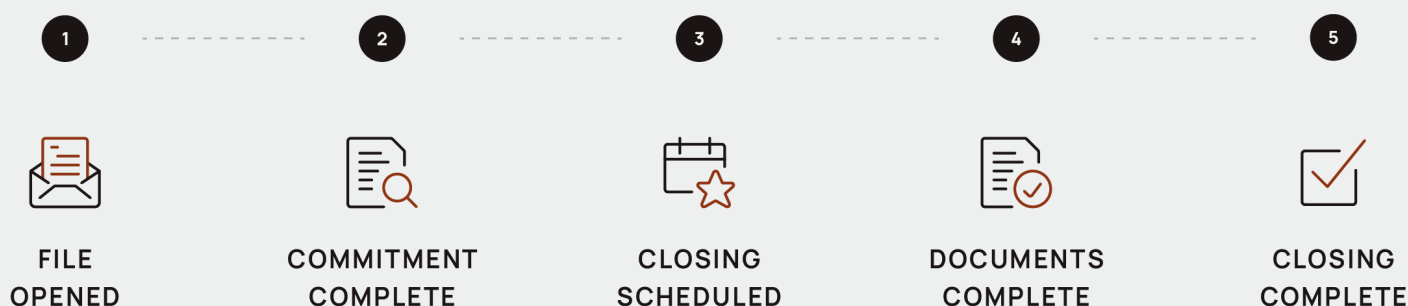
THE PIZZA TRACKER FOR TITLE™

If someone can track their \$10 Dominos pizza, why shouldn't they also be able to track their \$400,000 home closing? That was the inspiration behind the famous CloseSimple "Pizza Tracker for Title" timeline for the closing process.

Now, years later, based on the millions of text message and email updates we've helped title and escrow companies send, we've been able to narrow down the 5 best and most used steps to help everyone in the closing understand the process.

It is worth noting that there's nothing magical about 5 steps versus 6 or 7 steps, but we urge anyone that implements CloseSimple to keep it simple.

Resist the urge to over-communicate. These 5 steps can serve as a good baseline for a Title & Escrow company to streamline their closing communication with CloseSimple. Each timeline is customized to the individual company by our the CloseSimple team.



“

After receiving our email & text message updates, one real estate agent said they make 75% fewer calls to our Escrow office than other ones they work with... with the help of CloseSimple I'm sure we will eventually get 100% of their business soon!"



Brynne DesMarteau-Ray
Escrow Operations Manager
Affirmative Escrow

OVERVIEW OF CLOSESIMPLE

CloseSimple layers on top of your current Title Production Software (TPS) to help you communicate important steps during the closing process by sending automated text messages, beautiful emails, and the Pizza Tracker for Title™ timeline.

If a consumer can track a \$10 pizza from Dominos with their famous “Pizza Tracker,” why shouldn’t they know the status of their \$400,000 home closing?

Your timeline, text messages, and emails are custom made for your title company and feature 5 updates that help Real Estate Agents, Buyers, Sellers, and mortgage professionals understand what’s going on. All done while reducing the amount of inbound questions you will receive during the closing.

Wouldn't less questions be nice?

Wouldn't it be great if Real Estate Agents let you do your job instead of constantly asking for updates?

Wouldn't it be great if you and your team could work on things that drive your business forward?

In fact, we had one client tell us that a Real Estate Agent told them that because of the proactive CloseSimple updates, they have 75% fewer questions for that title company, compared to another title company they also close with.

Which begs me to ask, **what would 75% fewer questions during the closing process mean for you & your teams productivity?**

We love hearing that type of feedback ... now we just want to know what it will take to get that real estate agent to give 100% of their files to our client that is using CloseSimple.

The goal of these proactive pieces of communication (text messages, email, and pizza tracker timeline) is not simply to communicate more... but rather to communicate better.

My Co-Founder Bill Svoboda likes to say that these proactive pieces of communication address the “3 Ws” that everyone is looking to answer:

- What *has* happened?
- What *is* happening now?
- What *will* happen next?

By addressing the 3 Ws with proactive communication, you will reduce the anxiety of the individual who is going through the closing process, and earn you trust.



It gets even better, if you can combine proactive communication with automation... Imagine how great it would feel if communication could automatically go out from your TPS.

Depending on how your TPS is setup, that could be a reality for you.

Talk about innovation.

So the big question to ask yourself is “What do you want to communicate to during the closing to help them understand what is going on?”

We’re looking forward to helping you look amazing at every step of the closing process.



As you go through the next few pages and look at these templates, imagine what your title company’s timeline, email, and text messages would look like as we customize each mode of communication with your name, logo, and colors in the place of the “ABC Title” brand.

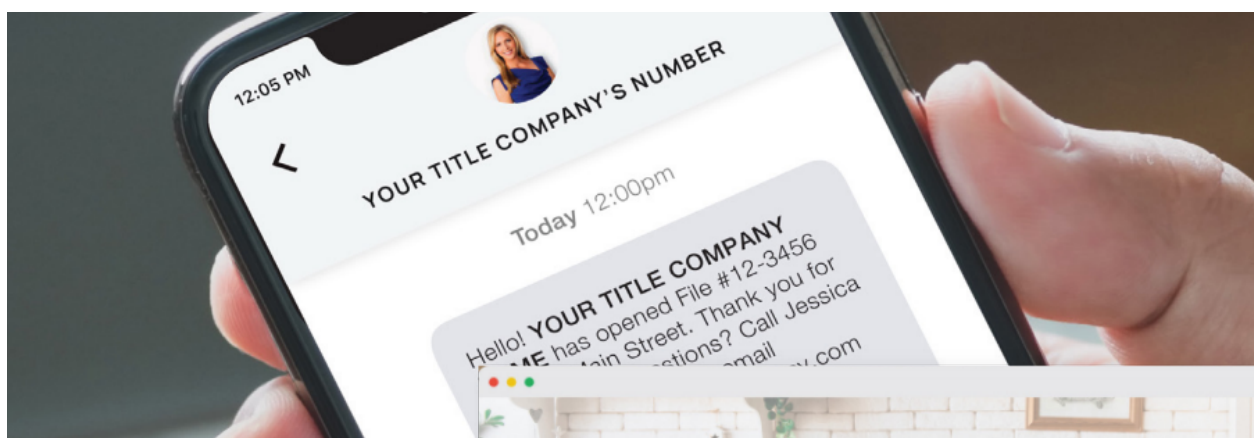
CloseSimple helps you get the credit for all of the hard work you’re doing during the closing.

The CloseSimple team is with you every step of the way, from listening to how you want your communication to look & feel, to building it for you, working through the integration with your TPS and then most important, after you launch.

So again, as you look through these templates, imagine what this type of proactive communication can do to help you communicate during the closing process and what it could mean for your brand.

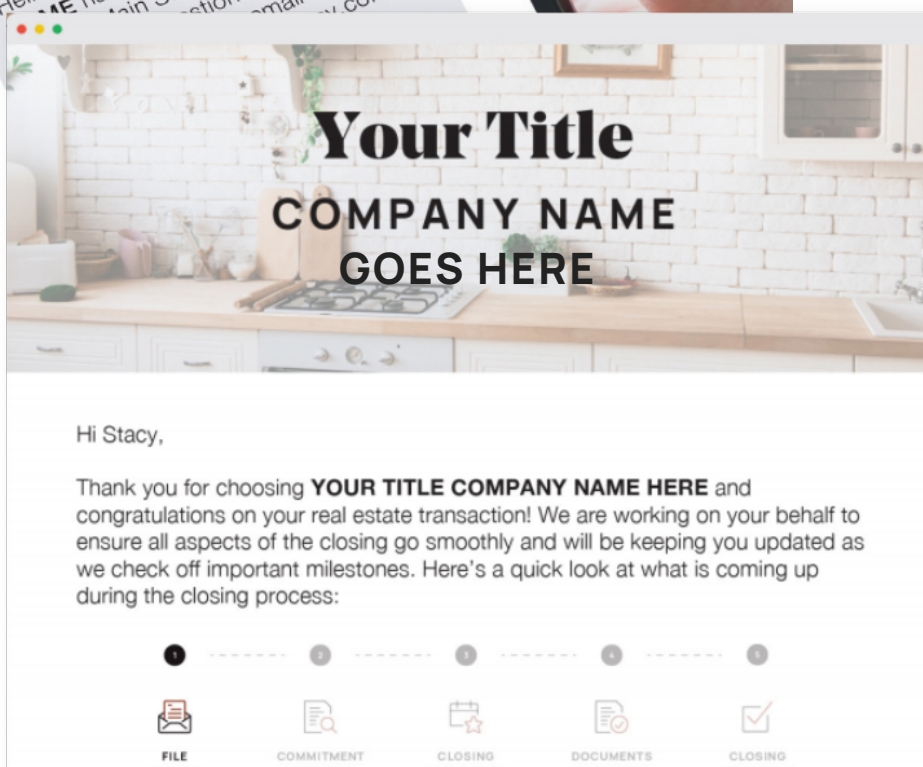
STEP 1: FILE OPENED

Can we all agree that a real estate transaction is actually kind of complicated? (C'mon, let's be real here) Both Real Estate Agents and consumers really don't know what all goes into the closing process, so remove the guesswork and surprise everyone with this "welcome" text and email. Let them know that you got their file, introduce your company and tell them what to expect over the next few weeks.



WHY IS THIS IMPORTANT?

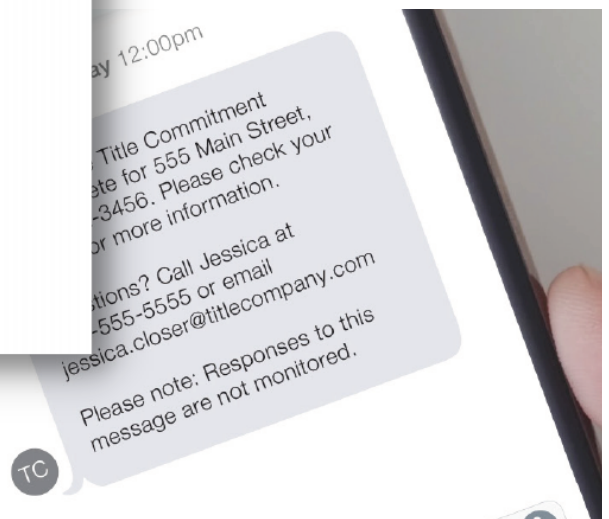
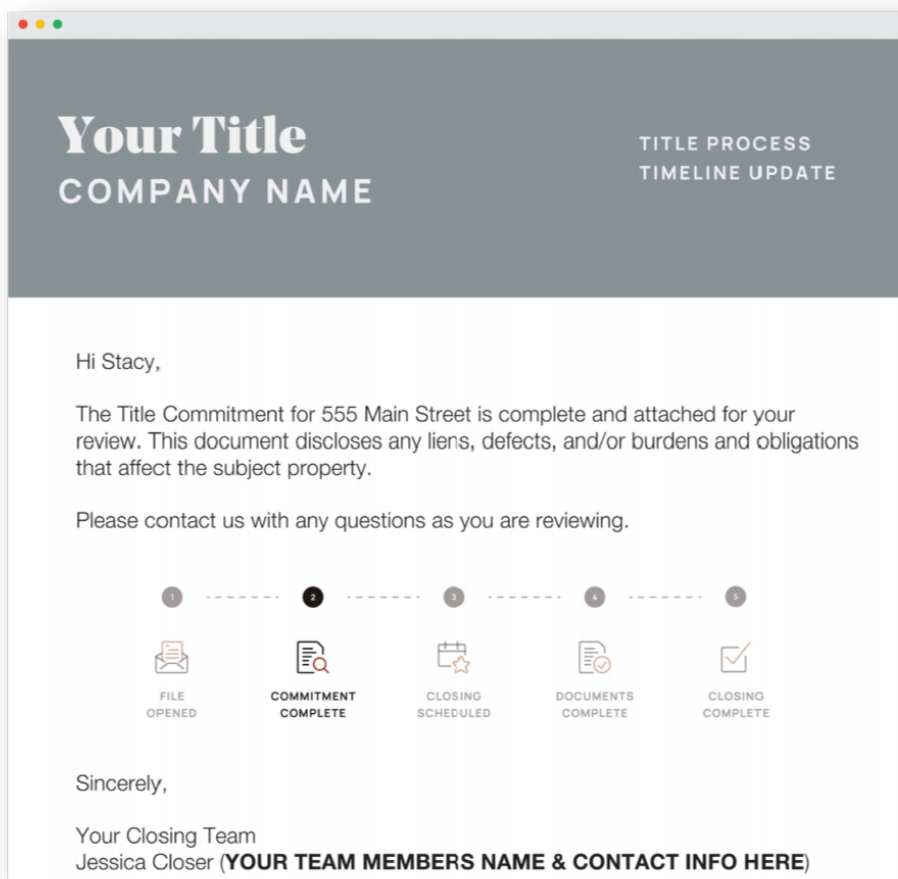
Proactive Communication will not only help everyone understand what's going on, it sets your company apart from others that don't even let the Real Estate Agent or consumer know they received the file.



STEP 2: COMMITMENT COMPLETE

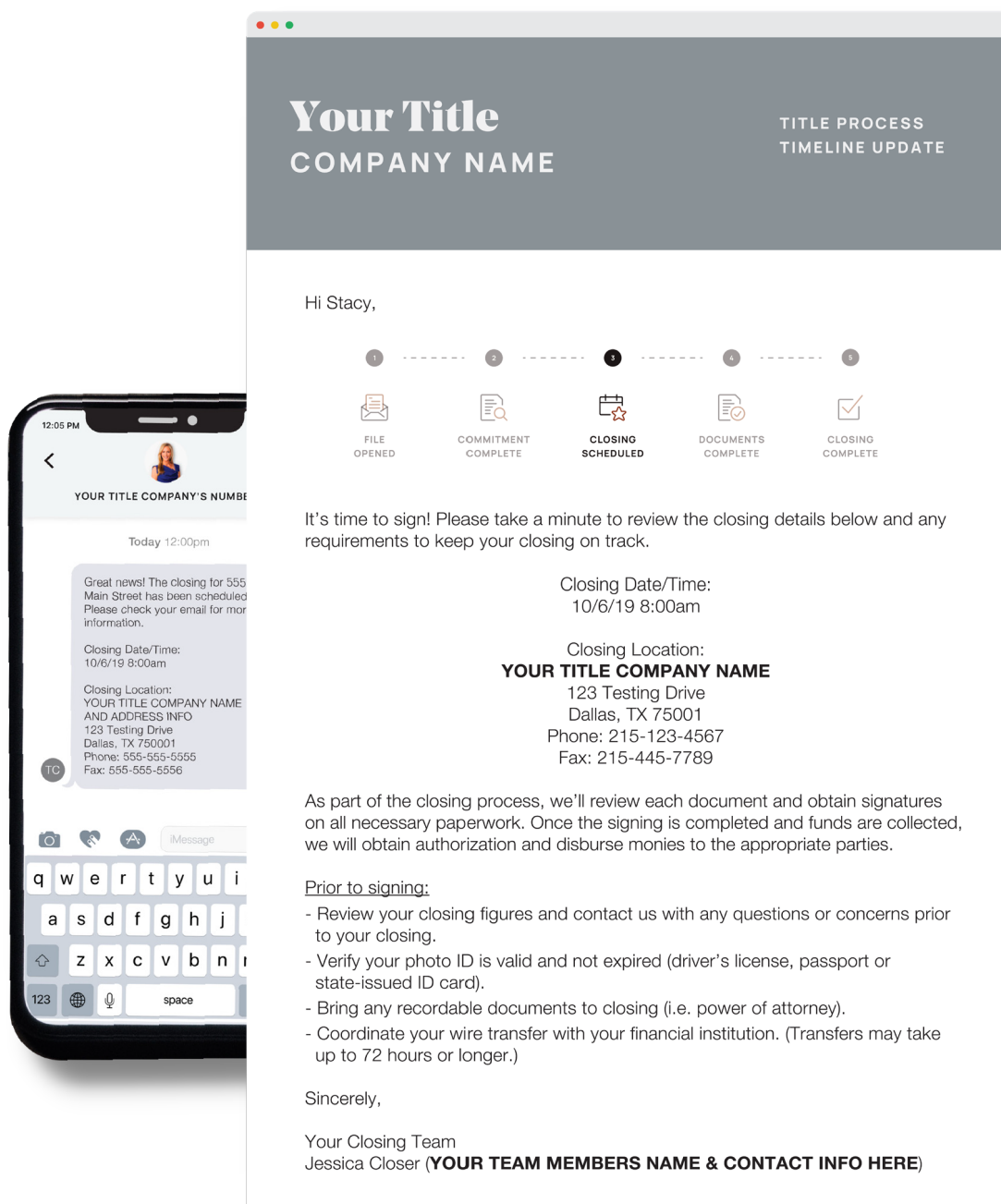
On this 2nd template, we have removed the visual header from the previous email and replaced it with a solid block of color (based on Title Company's brand). The emphasis is now on the timeline rather than the header image.

We have also attached the Title Commitment because CloseSimple sends each outgoing email through your email server (encrypting it with your own settings).



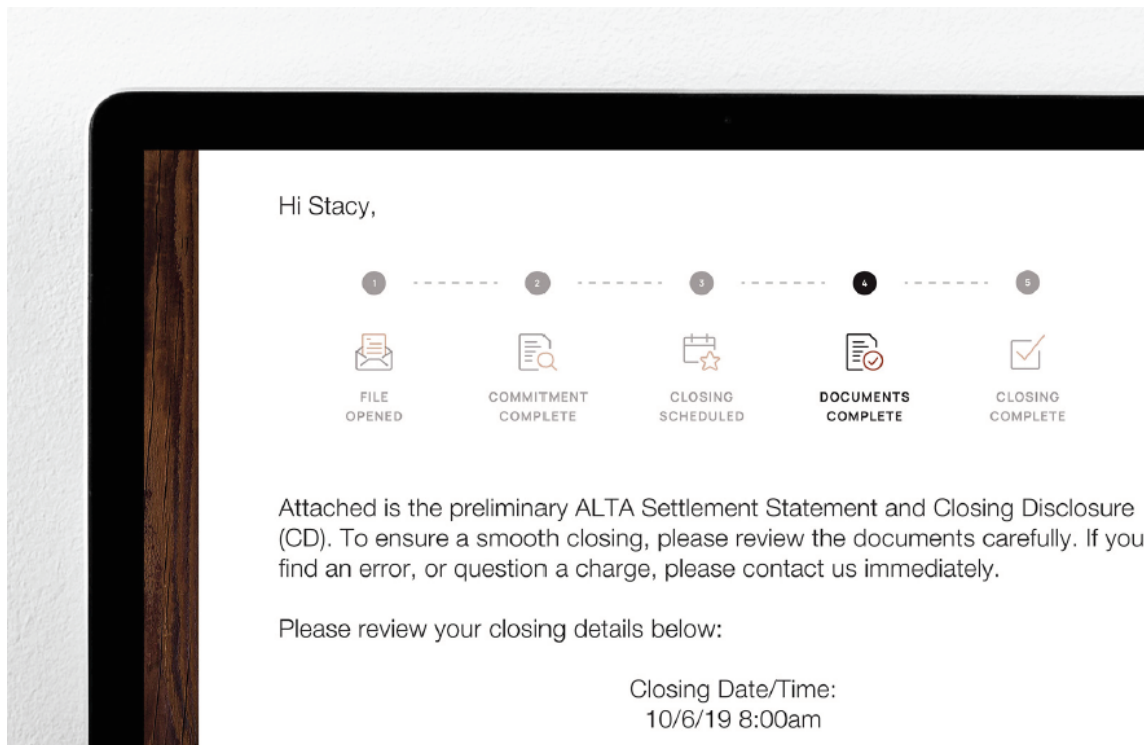
STEP 3: CLOSING SCHEDULED

Depending on how we set up your integration, the closing information will pull from your Title Production Software or CloseSimple.



STEP 4: DOCUMENTS COMPLETE

A friendly reminder with any last minute info about the closing is always a nice touch from a Title Company to the Real Estate Agent and consumer.

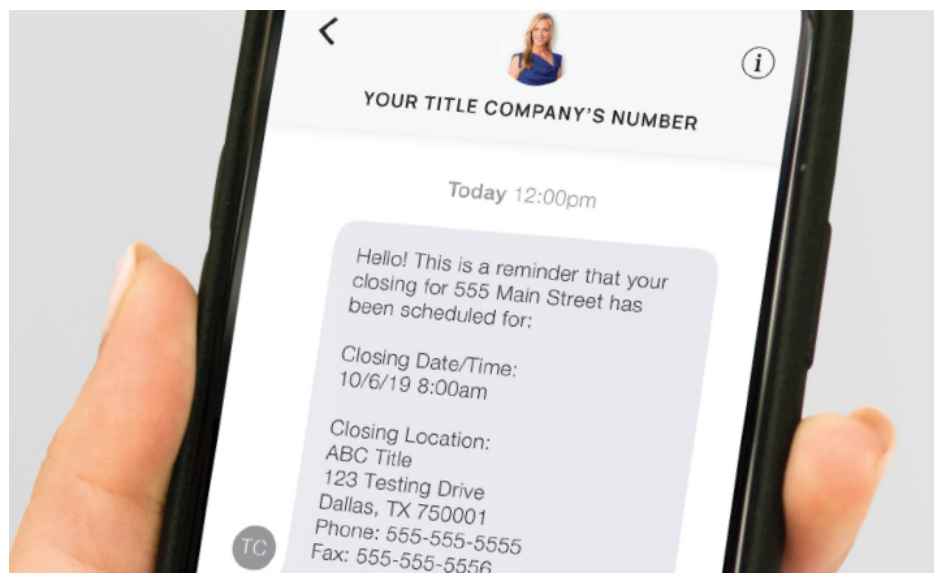


QUESTION:

How much would a friendly text like this help your Real Estate Agent, Buyer or Seller as they prep for the closing day?

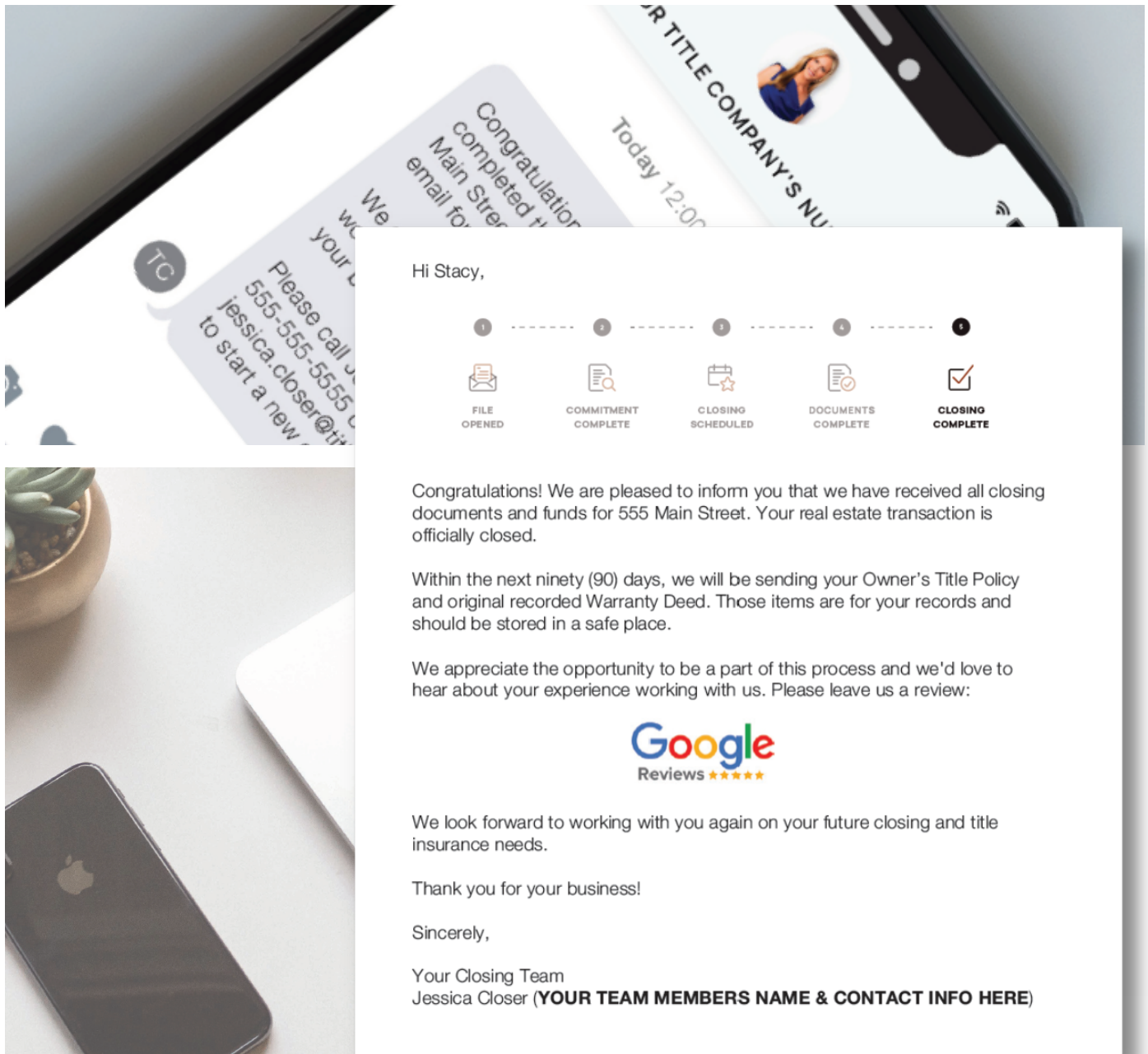
ANSWER:

A lot.



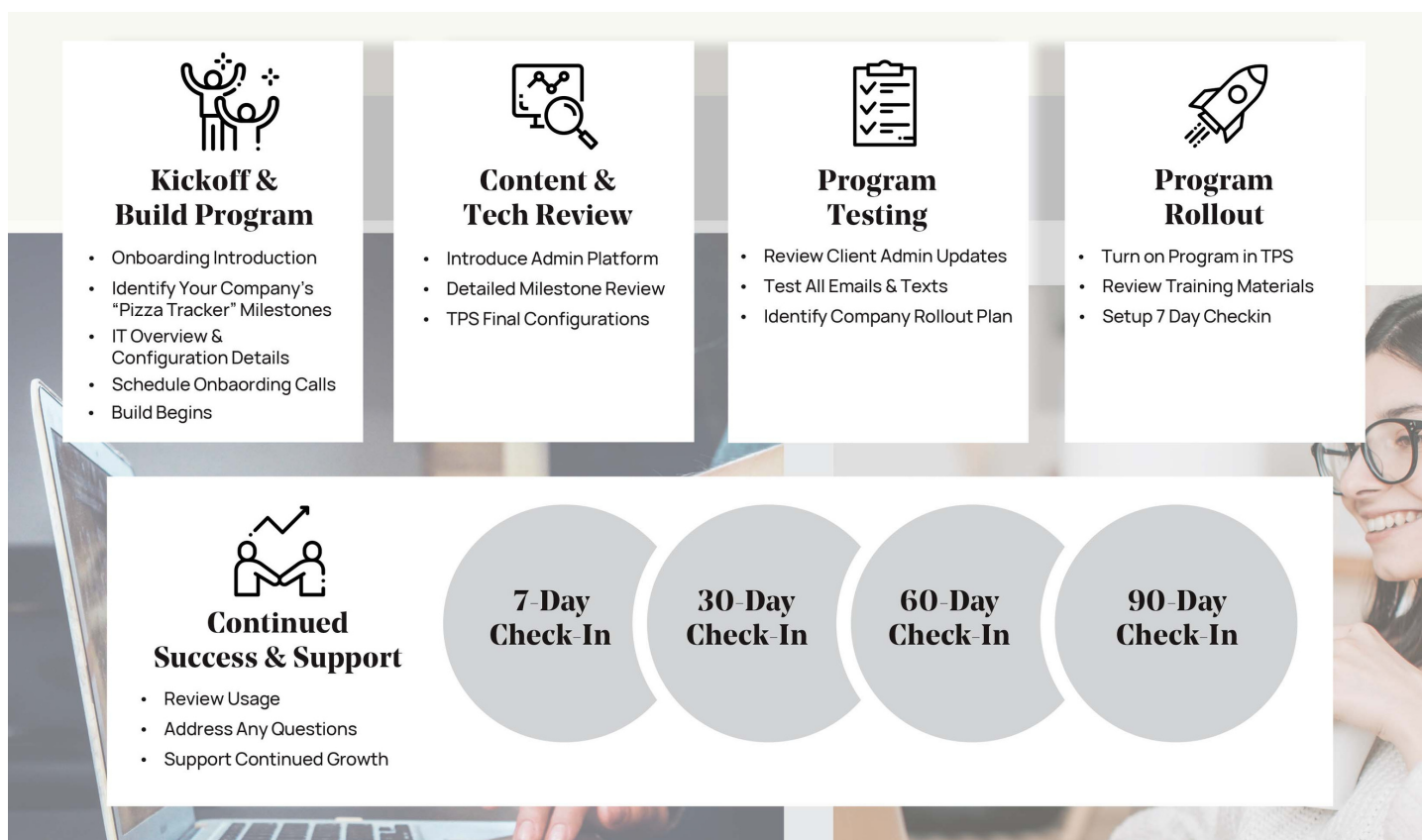
STEP 5: CLOSING COMPLETE

Get the credit you deserve by inserting a link to your Google page, asking customers to complete a survey or directing them to something else.



ONBOARDING & SUCCESS

With a name like "CloseSimple," it better be simple, or we named it wrong.
A typical onboarding takes 2-3 weeks, requires 3 Zoom calls and is led by a dedicated CloseSimple team member.



NEXT STEPS

Hopefully, these have given you an idea about how CloseSimple can help you communicate better during the closing process & reach your goals.

Please let me know if you'd like to discuss next steps, pricing, or anything else.



Paul Stine

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