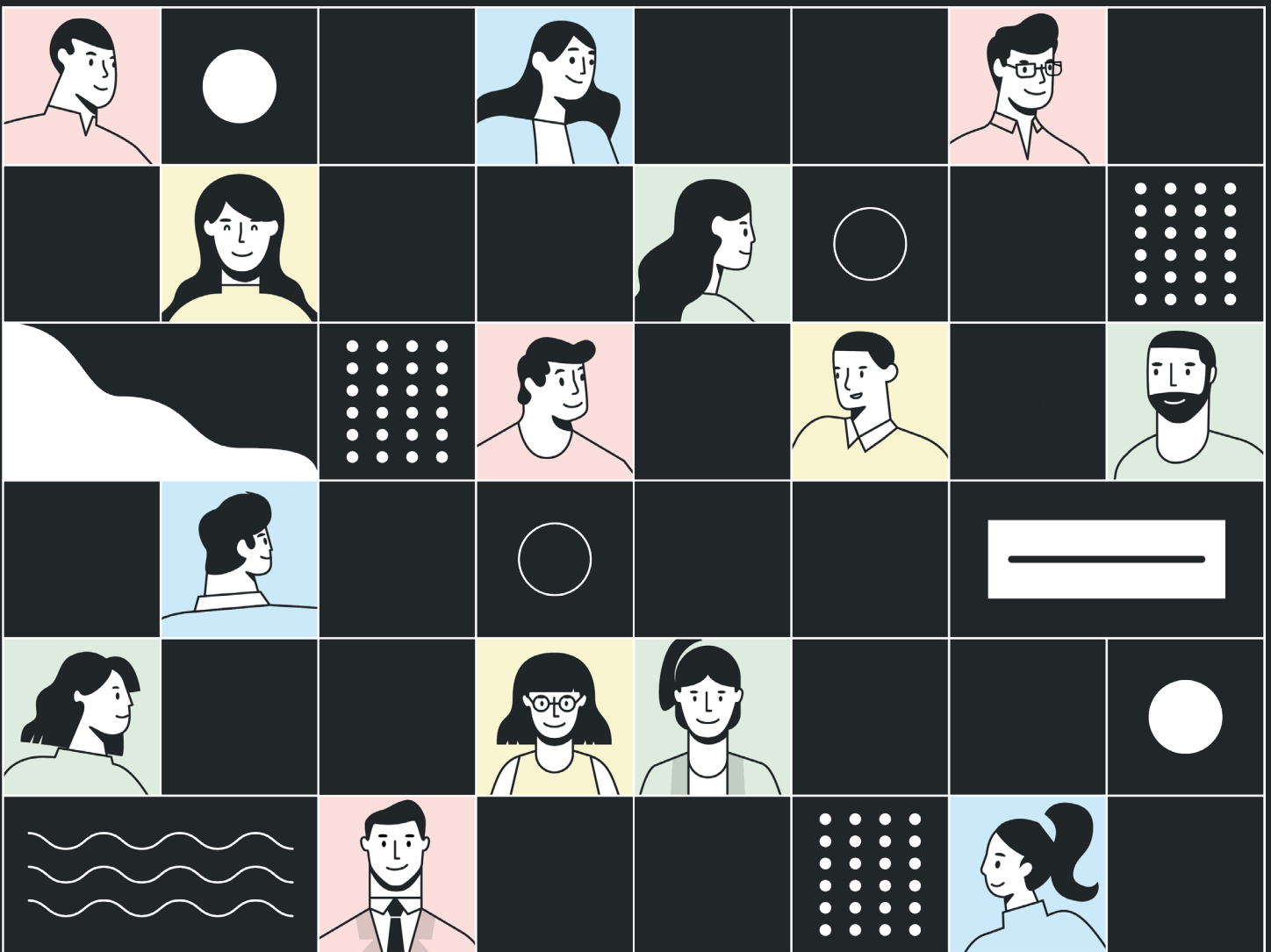



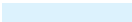



# Leading Teams Through Change: How to Create an Effective Training Program



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# Why Training is More Important Than Ever for the Title Industry

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# 93% of Employees

stay at companies longer if the company invests in their careers.

—LinkedIn



Most people who enter the title industry come into the profession by (happy) accident. There’s a common saying in the industry that “most people don’t find title work, title work finds them.”

It’s true that a particular set of circumstances and encounters typically brings new employees into the title business. Title & escrow companies with the best recruitment strategies capitalize on the unique characteristics of title work to inspire prospective employees with the limitless learning and career growth opportunities the industry offers.

These career and personal growth opportunities are never more present than during times of change.

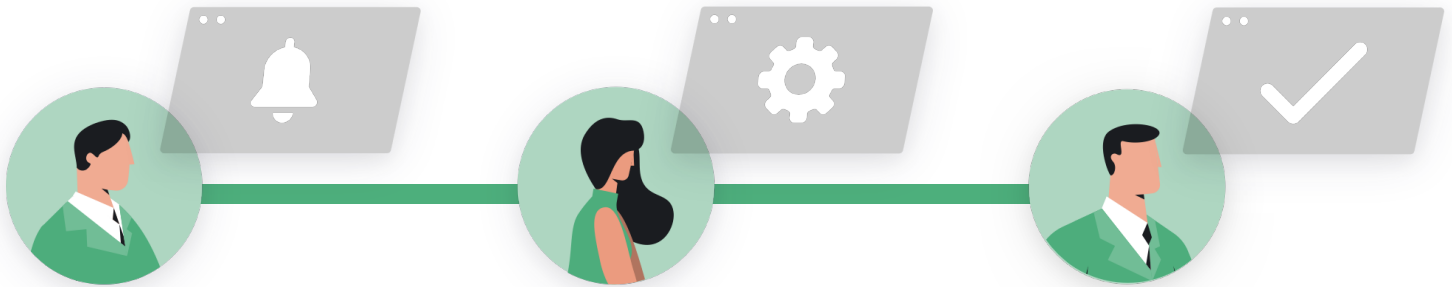
**Today’s economic challenges and uncertainty pose new challenges for the title industry, yet they also offer title professionals opportunity for growth.** Title & escrow

professionals (who often possess a natural affinity for problem solving) are eager to adapt quickly to help bring stability and clarity to real estate transactions.

Nurturing this adaptability and professional growth starts with proper onboarding for new hires and continues with ongoing training that supports professionals as they learn new skills and ways of doing business to help drive the industry forward. Employers must develop the capacity to quickly retrain employees and help them build on top of their existing knowledge so they can thrive in the face of new realities.

This level of training and support also keeps employees engaged, leading to higher retention and employee satisfaction. A study by LinkedIn indicates that 93% of employees stay at companies longer if the company invests in their careers.

## 01 INTRODUCTION: WHY TRAINING IS MORE IMPORTANT THAN EVER FOR THE TITLE INDUSTRY



There are a number of challenges specific to the title industry that make onboarding and training uniquely challenging\*:

- 1 There are not many formal degrees that provide a direct path into title & escrow work so most employees come into the industry completely green. *(Note: A few states are moving toward developing formal title industry training including Virginia, and the state of Indiana [currently has a program in place.](#))*
- 2 Finding the right balance of information for a new employee to begin work is challenging. Without a complete understanding of the full real estate closing process, employees won't understand "why" they are completing certain tasks. However, too much information can quickly feel overwhelming to a new employee.
- 3 Many title & escrow businesses are dealing with uncertainty and instability and simply don't have time to dedicate to training new employees without falling behind on orders.
- 4 Regulations are constantly changing and will continue to change in light of recent public health events and an impending recession which makes learning materials difficult to maintain and properly update.

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\* Insights gathered from roundtable discussions with more than 100 title professionals at Qualia's Future of Real Estate Summit

## 01 INTRODUCTION: WHY TRAINING IS MORE IMPORTANT THAN EVER FOR THE TITLE INDUSTRY



The unique challenges the title industry faces highlight why a formalized workplace training program is worth investing in. By putting effort into a training program up front businesses can:

- Ensure productivity does not drop when new employees join the team or when regulations and other government action cause changes to daily workflows
- Support employees with structured learning materials that provide clarity, continuity, and business-wide standards as business operations shift
- Engage employees with continued learning and reframe uncertainty and change as an opportunity for career growth
- Easily train employees with properly-paced learning that incites excitement for their role within the company and their role within the broader real estate landscape

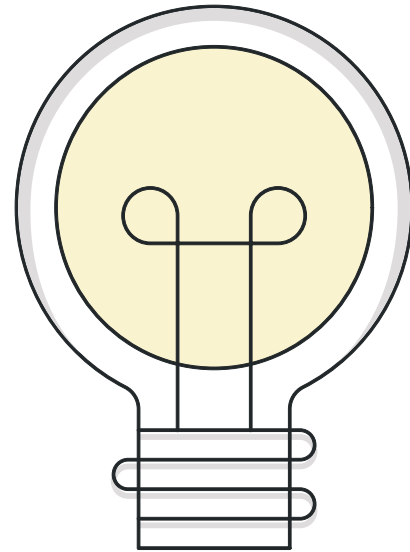
In this guide, we'll dive more deeply into why workplace training programs are worth investing in so you can make a case for workplace training at your business. Plus, we'll provide a step-by-step path to creating a workplace training program that meets your business needs.

# How Workplace Training Supports and Engages Employees





## Off on the right foot: the value of effective onboarding



Onboarding is often under-recognized as a business-driving and business continuity tool. However, effective first-month training sets the tone for a new employee in terms of how supported they feel in their new role, how adaptive they are to future changes, and ultimately, how productive they are as new team members.

New title & escrow employees can feel especially overwhelmed when they join a new organization. There is much to learn about the industry at-large (including regulations, security risks, and complex processes and documents) and how their particular function fits into the broader picture. According to the Society for Human Resources Management, organizations with a standardized onboarding program report **50% greater productivity among new hires**. With proper onboarding, employees feel equipped to work confidently in their new role and are more likely to develop as leaders themselves.

Similarly, onboarding is just as important for existing employees when they are training with new software or other technology. When employees feel supported during the initial ramp-up period, they are more likely to embrace the new software and use the features to their full potential.

Despite strong evidence that employee onboarding is an effective employee engagement tool, a recent Gallup poll found that 88% of employees think their employer did a poor job with onboarding. By creating an effective onboarding program, title & escrow businesses can gain a competitive edge among their peers who may not be as focused on building up their new talent with well-designed training materials.

## Keep your best employees: the value of ongoing learning & training for developing leaders & adaptable employees



A 2019 CNBC Workplace Happiness Index study found that training is a top indicator of workplace happiness. When respondents were asked: “Aside from higher salary, what is the one change that would most improve your job satisfaction?” The highest rated answer was “More training or learning opportunities.” This answer ranked above “more paid time off,” “a more flexible schedule” and “a shorter commute.”

It’s clear that employees are hungry for knowledge, professional development and leadership opportunities. Providing formalized learning programs not only keeps employees happy and engaged, **it also provides a built-in mechanism for businesses to develop leaders who can make confident decisions and help drive the business forward during times of change.**

Equally important to developing new leaders is the need to engage and retain industry veterans who possess valuable knowledge. These employees are especially important for mentoring the next generation of title & escrow professionals and helping guide teams through change. They possess nuanced information and often have decades of experience handling a variety of different title-related scenarios and challenges. “People of the baby boomer generation enjoy the concept of passing the torch to people coming into the industry,” Qualia’s Director of People, Vanessa Lyall, said.

While many assume Baby Boomers are close to retiring, many Baby Boomers are interested in staying in the workforce longer than previous generations—particularly if they receive opportunities to continue learning and developing new skills. According to a Harvard Business Review study, Gen Xers and Baby Boomers are seeking opportunities to broaden their skill set at work. Almost 60% of people over the age of 45 said they were actively investing in learning new skills at work.

# How to Create an Effective Training Program

### 03 LEARNING & DEVELOPMENT GOAL SETTING: HOW TO CREATE AN EFFECTIVE TRAINING PROGRAM

Once you've made a case for a formal training program at your company, it's time to start moving the needle on launching an effective training program.



Before launching the specifics of your program such as what lessons you'll provide or how frequently you'll update training materials, it's important to outline the scope of your program and your goals.

#### To begin, ask these questions:

- How will training fit into your broader business continuity plan as you adapt to changes?
- What is the scope of the learning opportunities you will offer? (e.g. just onboarding? Broader professional development? Technology training?)
  - *Note: LinkedIn's 2020 Workplace Learning Report indicates that learning & development programs are increasingly focused on building new skills to prepare employees for what's ahead*
- How will you structure workplace learning? (e.g. will it be in-person or digital? How will you adapt in instances such as COVID-19 when in-person learning is limited? [Mckinsey Research indicates that roughly one-half of in-person programs through June 30,2020 have been postponed, canceled, or driven to an online environment])
- Do you plan to outsource the development of some or all of your training materials? If so, is it possible to leverage resources from technology partners or other partners?
- Who will be the internal point-person to manage or oversee your training program?
- How will you involve leadership and managers?
- How will you solicit feedback and input from employees?
- How will you measure the success of your program?



## Answering these questions can be difficult without best practices and expert recommendations in mind.

We spoke with Udemy (a technology company specializing in upskilling and learning & development programs) to outline best practices title companies of any size should consider when creating a learning program. Udemy's Head of Learning and Development, Shelley Osborne, offered a few recommendations:

**1 Prioritize learning regardless of budget.** While learning programs may seem low priority when budgets are restricted, proper employee training is critical for efficiency and productivity—and can ultimately lead to reduced operational costs. According to Osborne, learning should be prioritized in every organization's budget. "For organizations to stay competitive, employees must be experts in their fields and drive true value for the business. A major threat to employees in achieving that goal is the increased speed of innovation that every field, industry, and role is experiencing," she noted. "That said, I understand that no one has an unlimited budget. The good news is that we're living in a time when there's never been greater access to learning content. So many cost-effective resources are available online, and there are so many ways to embed learning in your culture."

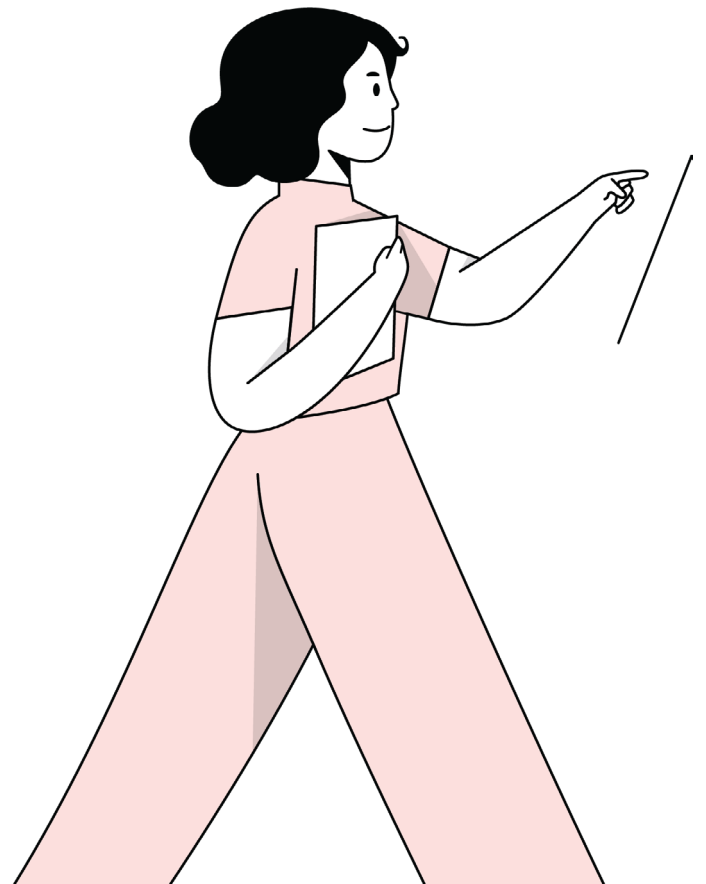
**2 Give employees a solid start with effective onboarding.** Udemy's research finds that 79% of employees believe onboard training "accelerates time to productivity." New employees say they desire content and training around business processes, productivity tools, and background on the business' organizational structure for a confident start. Creating a standardized onboarding experience ensures that each employee receives the same level of training and support right out of the gate.

Standardizing onboarding materials also reduces the burden more tenured employees often experience when a new employee joins a team. Within title & escrow businesses, the onboarding process can feel time-consuming and stressful for veteran employees who are often tasked with training new hires. Creating a standardized onboarding experience removes some of this burden and enables experienced employees a chance to offer more relationship-driven training through mentorship.

### 03 LEARNING & DEVELOPMENT GOAL

#### SETTING: HOW TO CREATE AN EFFECTIVE TRAINING PROGRAM

- 3 Incorporate soft skill training.** Between 2017 and 2018, respondents of Udemy's workplace survey were 10% less likely to cite tech skills as the "most valuable" skillset for employment. Today, employees are increasingly citing "soft skills" such as leadership and productivity as "most valuable" to employers. As technology advances, technical fluency is important; however, employees will also need to keep pace with the demand for the changing capacity of their roles toward more adaptable skills such as relationship management, leadership, and business development.
- 4 Provide go-at-your-own pace learning tools.** According to Osborne, most employees value flexibility in L&D programs. "At Udemy, this means giving employees access to learning content whenever they need it – whether that's during their morning workout, while they're in the office, or on their evening commute," Osborne said. "Recent research we conducted found that 42% of employees say they would be more engaged if they were empowered to learn new skills. We feel like giving employees the time, space, and flexibility to learn makes all the difference."
- 5 Involve managers and leadership.** "The value of managers and other leaders being supportive of L&D and continuous upskilling cannot be overstated," Osborne said. At Udemy, a learning mindset is engrained in the company culture and promoted from the top-down. "A priority during the leadership hiring process is to ensure that new hires are culture adds and bring a passion and curiosity for learning."



# What does a Solid Training Program Look Like?

## 04 BEST-IN-CLASS TRAINING: WHAT DOES A SOLID TRAINING PROGRAM LOOK LIKE?

After defining the goals and scope of your program, you'll want to consider how you'll go about creating training materials or finding the best training materials from a third party.

Online learning is a great option to ensure a standardized and consistent learning experience—especially for training employees on technical aspects of their role such as how to use technology tools and how to comply with regulations.

Grace Scott, who works on Qualia's Customer Success Operations team, develops high-touch online training materials for Qualia customers. Most recently, she helped relaunch Qualia University, an online, flexible learning environment for Qualia users to onboard onto Qualia's platform and learn new skills.



—Grace Scott, Customer Engagement Manager, Qualia



## These are the features Grace believes successful online learning & training platforms possess:

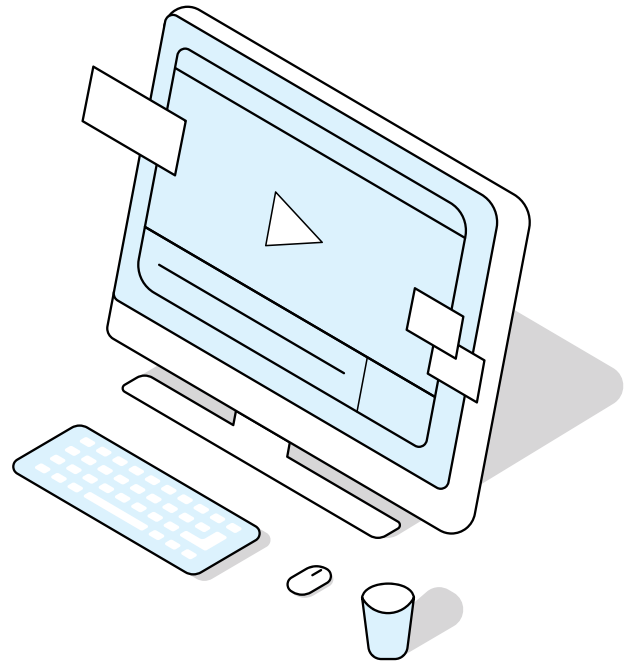
### 1. FLEXIBLE, SELF-PACED TRAINING

Today's learner expects go-at-your-own-pace training he or she can access anytime and any place. As mentioned earlier, those who can access training materials on their own time are more likely to feel optimistic about technology changes.

"Our learning platform offers self-paced, modular courses so learners can take courses applicable to their role in any order and at any time," Grace said. "Our platform is also built on a web-based portal, so learners can access training anywhere. That means they could take the training courses at their desk during work hours or on the bus during their commute into work. You can even log in to Qualia University on your phone."

### 2. BITE-SIZED TRAINING CONTENT

Today's learner wants highly-accessible information at their fingertips to problem-solve for specific scenarios and troubleshoot in real-time. Bite-sized, single-topic modules help learners search for and find the information they need quickly.



"On our previous training program, videos were longer and covered multiple topics in one module. A user would need to scrub through a video to find the information they were seeking," Grace said. "When we relaunched Qualia University, we made the modules more digestible by parsing out specific topics and creating shorter videos. You can also watch the videos at 2x speed."

### 3. INCENTIVES AND INTERACTIVITY

Research indicates that 70% of business transformation efforts fail because employee engagement is lacking. Interactive educational platforms help employers make learning fun. By combining education with game-like elements, users are instantly rewarded through real-time feedback and achievement recognition.

"After completing coursework, learners earn Qualia University certifications that they can display on their personal LinkedIn profiles to show off their personal achievements," Grace said. "Additionally, we offer interactive quizzes and assessments that deliver real-time feedback on training material proficiency."

# Leveraging Your Partners & Other Resources to Create a Training Program

## Making the decision to launch a formal training program doesn't mean you have to create the curriculum and training materials from scratch.

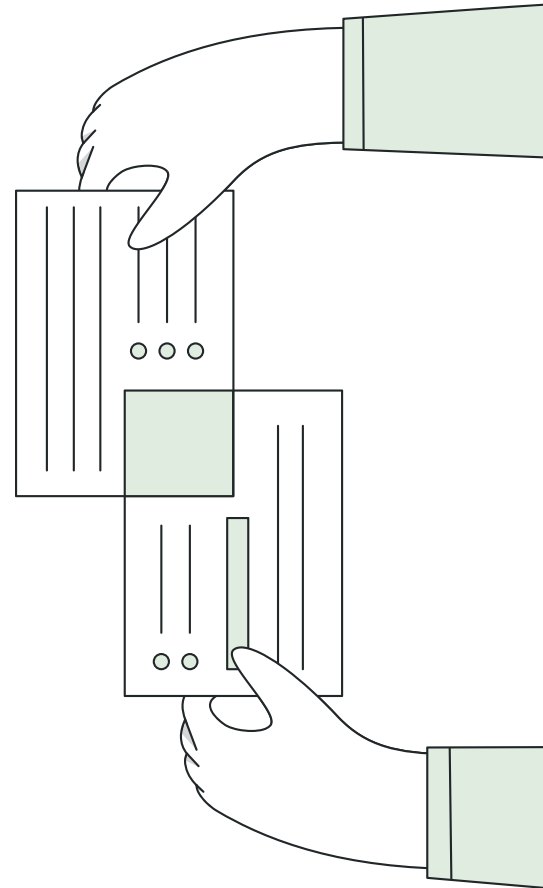
Some software partners offer training solutions for their customers to effectively onboard new employees and retrain existing employees on their day-to-day technology. There are also online platforms that enable businesses to create their own digital training curriculum. Additionally, third-party resources like American Land Title Association (ALTA) offer training materials for a fee as well as free ongoing learning resources.

### Utilize existing training materials and programs

Qualia offers customers a full online learning program called Qualia University to train their staff on Qualia's software. Qualia University provides users with unlimited access to in-depth, self-paced training videos developed by our onboarding specialists.

With Qualia University, employees can access information on-demand to:

- Learn everything they need to know about Qualia's most recent features
- Easily navigate to course modules that are most relevant to their role
- Take short assessments to ensure they leave each section with essential knowledge



## 05 LEVERAGING YOUR PARTNERS & OTHER RESOURCES TO CREATE A TRAINING PROGRAM

Qualia University comes with two professional certifications as well – Qualia Certified User and Qualia Certified Expert. These certifications can be displayed on employees' LinkedIn profiles to demonstrate their expertise with Qualia's platform.

In addition to the resources your software provider may offer, many industry training and ongoing learning programs exist that you can leverage to curate your own training program. Below are a few resources to consider:

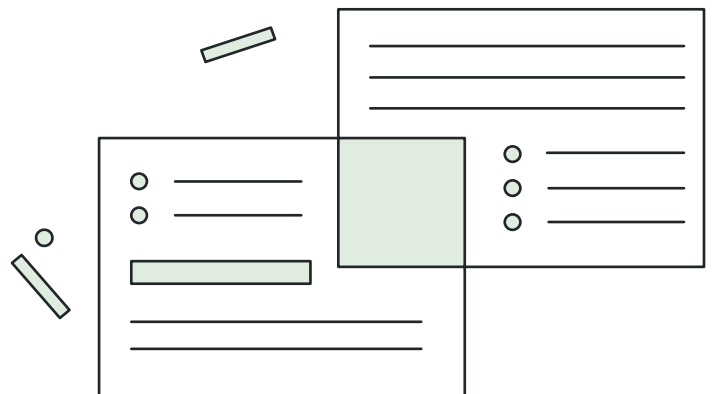
### Industry training materials:

- [ALTA's Learning Center](#) offers industry courses for a fee
- ALTA's Learning Center also offers [industry training videos](#) that employers can purchase
- October Research [offers webinars](#) for a fee on the most relevant topics pertaining to real estate, title, financial, and settlement service industry
- Industry events such as:
  - National Settlement Services Summit (NS3)
  - ALTA ONE
  - Inman Connect
  - Local LTA conferences
  - Qualia's Future of Real Estate Summit

*Note: some of the above noted events have been moved to an online environment in 2020 or rescheduled in light of COVID-19.*

### Ongoing learning:

- Qualia's [Resource Center](#) offers free eBooks, webinars, and other ongoing learning materials
- Qualia Insight offers weekly articles designed to empower title & escrow professionals with actionable advice from industry experts on the latest business growth opportunities, market trends and regional insights. ([Subscribe](#) to Qualia Insight)
- [ALTA offers ongoing webinars](#) on various industry topics
- Online learning sites such as [Coursera](#), [Udemy](#), and [Massive Open Online Courses](#) (MOOC) offer free online courses to support professional development on a variety of topics (e.g. customer service and sales training)



## 05 LEVERAGING YOUR PARTNERS & OTHER RESOURCES TO CREATE A TRAINING PROGRAM

### Consider investing in digital tools to create your own interactive training program

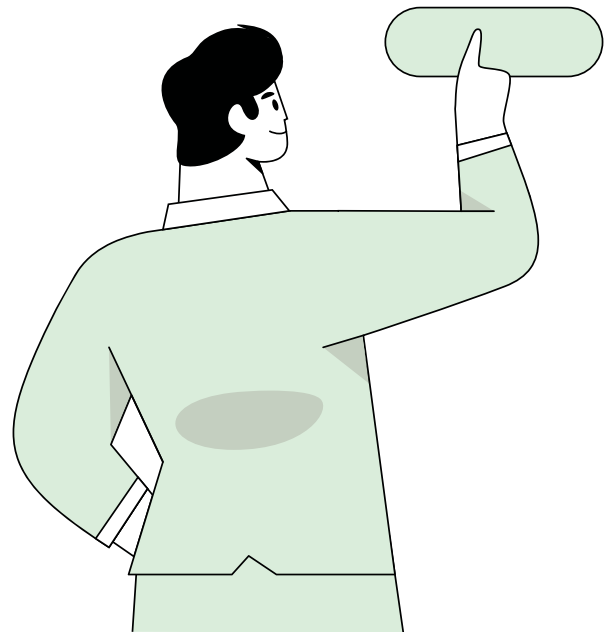
Instead of delivering a deluge of PDF documents and video content to employees, it's possible to design a digital curriculum with digestible lessons by leveraging platforms such as Skilljar and Lessonly.

These platforms enable employers to create company and industry-specific, digital training materials. Employers upload training documents into bite-sized lessons that employees can complete at their own pace online. These tools also offer the ability to incorporate quizzes and other assessments so managers can understand employee proficiency on various topics.

Qualia uses these platforms to onboard new hires and continually engage employees with lessons on pertinent industry topics and company updates that impact their day-to-day work. Managers are able to view who has completed lessons to ensure their teams are sufficiently aware and educated on important industry and company updates.

### Make the investment in learning & development programs now

As the real estate industry moves into uncertain territory in light of an impending recession in the aftermath of a global pandemic, effective training programs can deliver stability. When these programs are championed by leadership and engrained in the company culture, employees can complete their day-to-day work with confidence even as regulations, economic conditions, and home buyer expectations shift.



If you're interested in learning more about how Qualia helps businesses support their employees through ongoing learning programs and software skills training through Qualia University, reach out to a representative at <https://www.qualia.com/qualia-university> to learn more.

