



5 steps to digital closing success

Develop a clear plan, get your team on board, and drive successful eClosing adoption with these essential steps

Products and Services

Step 1 – Set expectations

Secure executive sponsors to relay information out to the organization on:

- Why your organization is adopting eClosing and how it's critical to future business success
- The adoption timeframe and benchmarks to meet along the way
- Resources that will be allocated to the project
- Productivity and ROI expectations once implementation is complete

Step 2 – Build a team and make a plan

Draw from the skills and insights of an implementation team that meets regularly (occasionally with the executive sponsors) and is moving towards a planned delivery date. Key stakeholders to recruit for your team include:

- Loan officers
- IT professionals
- Closers
- Settlement agents
- Post-closers
- Compliance officers

Step 3 – Testing, testing, and testing

Enlist the help of power users, supporters, and external stakeholders, including settlement agents to:

- Test the system
- Challenge functionality
- Test different use cases
- Provide feedback regarding any hiccups
- Do round trip testing
- Test again

Step 4 – Drive readiness and adoption

Deliver adequate training, resources, and support for team members to:

- Provide your team with primers, support materials, and other information to refer to
- Be clear about expectations going forward
- Communicate what to expect and what is expected to all internal users and settlement agents
- Give each individual a clear answer to the question, “How is my job going to change?”
- Extend a how-to guide to the borrowers

Step 5 – Measure and celebrate success

Take the time to look back on the goals and expectations you set in the beginning of your eClosing journey to:

- Determine if goals have been met
- Make adjustments for anything that is incomplete
- Analyze new processes and identify adoption struggles early on
- Take the time to celebrate successes
- Stay the course and work towards future goals – after all, this is just the beginning!



Reach us at: 1-888-955-9100 or schedule a demo at icemortgagetechnology.com/contact-sales