BLUE LINE AGENTS · CLIENT STORY

Meet Zoey, the AI escrow assistant who works while Coastal Title sleeps.

How a Cleveland title company ended a hiring revolving door, cut order-processing from hours to minutes, and saved $76,000 in year one, with an AI teammate that lives on their own network, on their own machine, with their own data.

< 2 min	~1,500	24/7/365	$76,000
TO COMPLETE A NEW ORDER	FIELDS PER DEAL, DONE ACCURATELY	NO BREAKS, NO TURNOVER	SAVED IN YEAR ONE

THE PROBLEM: A REVOLVING DOOR THEY COULDN'T CLOSE

Coastal Title had a hiring problem that every title company will recognize: escrow officers kept quitting. Every few months, another empty desk. Each departure kicked off the same expensive cycle: months of searching in a tight market, then weeks of retraining someone new on their systems and their process, only to watch it happen again.

The next hire was going to cost **$90,000 a year in salary, plus benefits**, for a seat with no guarantee anyone would stay in it. That's when Coastal came to Blue Line.

THE SOLUTION: DON'T FILL THE SEAT. RETIRE IT.

Blue Line built **Zoey**: a custom AI assistant built around the way Coastal actually works. Zoey learned the fine details of their title production software and data-entry process. She is not an off-the-shelf tool; she is a teammate fluent in *their* system. She fills every kind of field a human can: lookups, dropdown selections, calculated values. She does the math, verifies her own work, and files a report on everything she completes.

HOW ZOEY GETS TO WORK

Every 5 min	Zoey scans the incoming email queue for new orders and documents, around the clock.
< 2 minutes	A new order is opened and completed: about 1,500 fields entered, calculated, and verified.
2–7 minutes	Total elapsed time from an order arriving in the inbox to done. Not hours. Not tomorrow. Minutes.
Instantly	Every Coastal employee gets an email brief of exactly what Zoey worked on and completed. Full visibility, always.
Then	**Human review.** A Coastal officer reviews and signs off on Zoey's work. Machine speed, human judgment, nothing unchecked.

THE REVIEW LOOP: FAST AND CHECKED

Speed means nothing in title work if it isn't right. Zoey's process builds review in at three layers, so every deal moves at machine speed without ever skipping human judgment:

1 · ZOEY SELF-VERIFIES

She does the math, cross-checks the documents against the entered fields, and flags anything that doesn't reconcile, before a human ever looks.

2 · THE TEAM IS NOTIFIED

Every completed order lands in the team's inbox as a clear brief: what came in, what Zoey entered, what was flagged. Nothing hidden, ever.

3 · A HUMAN SIGNS OFF

A Coastal officer reviews and approves the work. High-stakes actions, wire transfers above all, are always handled by a person. Full stop.

That's the model: **Zoey does the keystrokes; Coastal keeps the judgment.** It's why eight deals completed over a weekend were also eight deals done *accurately*.

> *"We were constantly struggling to find and keep escrow officers. That's the problem I brought to Blue Line. When they suggested an AI agent, I'll admit I was skeptical. But Nick and his team laid out exactly what she'd be able to do, and we decided to give it a shot. I'm so glad we did. Zoey hasn't just changed our business; she's changed how we think about it. We have some of the best title and escrow people around, and Zoey frees them to focus on our customers. Blue Line customized her to our exact style, and we're perfectionists, yet she still exceeded our expectations. All while saving us hundreds of thousands of dollars over the next few years. I couldn't be happier."*
>
> **Dennis O'Brien, Owner · Coastal Title, Cleveland OH**

THE WEEKEND THAT SOLD EVERYONE

Zoey doesn't take breaks, and she doesn't wait for Monday. Over a single weekend, **eight new deals came in, and Zoey completed all eight**, accurately, before anyone was back at a desk. When the Coastal team walked in Monday morning, the work was simply *done*. The realtors couldn't believe it. Agents and lenders now regularly remark on how fast Coastal turns things around and gets answers back to them. That speed is becoming Coastal's reputation in the market.

THE REVIEWS ARE COMING IN

★★★★★

"Zoey has already been phenomenal, quick and helpful! We've already received positive feedback from clients (agents and lenders) on how appreciative they are of how quickly the order confirmations go out."

Liz Follen, Closing Officer · Coastal Title

GETTING NOTICED: WHY SPEED WINS COASTAL MORE BUSINESS

Agents and lenders **notice** who gets them answers first. Order confirmations that used to take hours now go out in **minutes**, and Coastal's clients are telling them they've noticed. In a business where every day off a closing timeline matters, **realtors choose the title company that closes deals fastest.**

Speed builds reputation. Reputation brings referrals. Referrals bring more deals. Zoey isn't just saving Coastal money; she's making Coastal the title shop agents want to send deals to.

THE MATH

YEAR-ONE ECONOMICS

Escrow officer they planned to hire (salary)	$90,000 + benefits
Recurring cost of turnover: recruiting, months unfilled, retraining	eliminated
Zoey, built and run by Blue Line	a fraction of one salary
Year-one savings	**$76,000**

And that figure ignores the upside: think about 1,500 fields per deal, entered by hand, deal after deal. That used to mean hours and days of work. Zoey gives that time back, and the speed itself is winning Coastal more business. The savings number doesn't count the growing deal flow that comes with a reputation for being the fastest, most accurate title shop an agent can send a deal to.

THE TEAM: ELEVATED, NOT REPLACED

Zoey wasn't brought in to take anyone's job, and she didn't. Coastal's people still own the judgment work: verifying, approving wire transfers, and, most importantly, spending real time with customers instead of keying data. What Zoey removed is the need to ever hire *another* escrow officer for data entry again. The revolving door isn't filled; it's gone.

THEIR NETWORK. THEIR MACHINE. THEIR DATA.

LIVES ON-SITE

Zoey runs on a physical computer inside Coastal's office, on Coastal's network, a machine **they own**. They can unplug her any time.

DATA STAYS HOME

Blue Line stores none of Coastal's data on our end. Their deals, their documents, their records. All theirs, full stop.

LOGGED & IN CONTROL

Every action Zoey takes is recorded. Only approved actions are allowed, and there is always an off switch. The team stays in control.

THEY OWN THE AGENT

Our clients own their agents and their data. Zoey is Coastal's employee; Blue Line just built and maintains her.

What could a Zoey do for your business?

Blue Line Agents builds custom AI employees for real day-to-day work: built around your systems, running in your office, owned by you.

FREE
AI AUDIT OF YOUR OPERATIONS

30 DAYS
FREE TRIAL OF YOUR AGENT

10% OFF
YOUR ENTIRE FIRST YEAR

Start with the free audit. We map where an agent saves you the most, no commitment.

WORKS WITH THE SYSTEM YOU ALREADY USE: SoftPro · ResWare · RamQuest · AtClose · TitleExpress · Landtech — and more

Blue Line Search Group · bluelinesearch.ai/agents · nick@bluelinesearch.ai

Results from the Coastal Title deployment, Cleveland OH, August 2026. Order completion times reflect real results from day-to-day use. Year-one savings reflect Coastal's staffing-cost comparison versus the planned escrow-officer hire. Published with Coastal Title's permission.