

## CASE STUDY

# Dallas-based National Title Insurance Agent + Aeon

Transforming title workflows through structured document intelligence

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CLIENT	SECTOR	FOCUS
Dallas-based National Title	Commercial Title	Workflow Automation

## Overview

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Aeon Legal Tech partnered with a Dallas-based National Title Insurance Agent (DBNTIA) to streamline several document-heavy workflows that traditionally required substantial manual review by title professionals.

DBNTIA implemented Aeon to support three core operational functions:

- Purchase and Sale Agreement (PSA) critical date and key deal information extraction
- Entity document review and signature authority analysis
- Title exception document analysis

The result was a more structured, repeatable workflow that reduced manual effort, improved consistency, and accelerated turnaround times across active transactions.

## The Challenge

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Commercial title transactions involve significant operational work before a file is ready to close.

Teams frequently spend hours:

- Reviewing PSAs to identify key deadlines and key terms
- Calculating critical dates tied to contractual triggers
- Reading layered entity structures to determine signing authority
- Reviewing title exceptions, easements, CCRs, and related documents
- Organizing and routing incoming documents manually

These processes are often fragmented across emails, PDFs, spreadsheets, and internal notes.

As transaction volume increases, title teams face pressure to:

- Turn deals faster
- Reduce operational bottlenecks
- Maintain consistency across reviewers

- Minimize missed dates or overlooked issues
- Improve visibility into transaction status

DBNTIA wanted a solution that could support real operational workflows — not simply summarize documents.

## The Solution

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DBNTIA implemented Aeon as a workflow execution platform for transaction operations.

Rather than functioning as a generic AI document review tool, Aeon was configured to execute specific title-related workflows in a structured and auditable way.

### 1. PSA Critical Date Extraction

Aeon reviews Purchase and Sale Agreements and extracts:

- Earnest money deadlines
- Inspection periods
- Closing dates
- Extension options
- Financing contingency dates
- Delivery obligations
- Notice deadlines
- Termination windows
- Other transaction-specific milestones

Aeon then organizes these into a standardized critical date output.

Beyond dates alone, Aeon also captures the key deal information needed to open a new matter in DBNTIA's title processing system — including parties, property descriptions, purchase price, deposit amounts, lender and broker details, governing law, and other terms required to onboard and manage the file. This eliminates duplicate data entry and allows new transactions to move directly from contract to processing.

### Dynamic Date Logic

A key capability for DBNTIA was Aeon's ability to interpret contractual date logic.

For example:

*“Inspection Period shall expire thirty (30) days after the Effective Date.”*

*Sample contractual date logic Aeon interprets and tracks*

Aeon extracts not only the rule itself, but also the relationship between dates.

This enables title teams to:

- Enter an Effective Date when needed
- Automatically recalculate downstream dates
- Maintain consistent critical date tracking even when agreements evolve

This reduced manual recalculation work and improved confidence in date accuracy.

## **2. Entity Document Review & Signature Authority**

Aeon was also deployed to analyze entity documents across complex ownership structures.

The platform reviews:

- LLC Agreements
- Certificates of Formation
- Partnership Agreements
- Corporate resolutions
- Incumbency certificates
- Trust documents
- Related organizational records

Aeon helps DBNTIA:

- Identify signing authority
- Determine required consents
- Surface ownership structures
- Highlight missing approvals
- Generate signature authority summaries

This significantly reduced the time required to review layered entity structures manually.

## **3. Title Exception Document Analysis**

DBNTIA also uses Aeon to review:

- Easements
- CCRs
- Restrictive covenants
- Access agreements
- Surveys
- Other recorded title exception documents

Aeon organizes and summarizes key provisions in a structured format that supports downstream review and closing workflows.

Instead of manually reading every exception document line-by-line, reviewers can quickly identify:

- Use restrictions

- Access limitations
- Maintenance obligations
- Transfer restrictions
- Approval requirements
- Other material provisions

## Workflow-Centric Approach

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One of the primary differentiators for DBNTIA was Aeon's workflow-centric architecture.

Aeon does not simply analyze documents in isolation. It organizes work into repeatable operational workflows with:

- Defined stages
- Role-based processes
- Structured outputs
- Standardized review paths
- Centralized transaction visibility

Documents loaded into a matter are automatically routed through the appropriate processing workflows.

This created:

- Greater operational consistency
- A repeatable process that scales with new hires and new offices
- Improved scalability across transaction volume
- Better visibility into deal status and bottlenecks

## Results

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### Faster Turnaround Times

Aeon reduced the amount of manual review required across several high-effort workflows, allowing title professionals to focus attention on substantive issues rather than repetitive extraction tasks.

### Improved Consistency

Critical dates, entity reviews, and title exception analyses were produced in standardized formats regardless of underlying document style or drafting differences.

### Reduced Operational Bottlenecks

By automating portions of document review and workflow routing, DBNTIA improved efficiency across active transactions.

### Better Visibility Into Transactions

Structured workflows provided clearer insight into deal status, outstanding tasks, review stages, and workflow bottlenecks.

## Why It Worked

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DBNTIA's implementation succeeded because the focus was not simply "AI document review." Instead, the focus was operational execution.

Aeon combined:

- Document intelligence
- Structured extraction
- Workflow orchestration
- Standardized outputs
- Transaction management

...into a single operational system designed for real transactional teams.

## Looking Forward

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DBNTIA continues working with Aeon to expand workflow automation capabilities across additional title and transaction processes.

The long-term objective is not faster document review for its own sake. It is a title operation that closes more transactions per professional, with fewer missed dates, a cleaner audit trail, and a process that holds up as DBNTIA scales.