

# Resort company improves sales efficiency and customer engagement with digital solutions

Real Impact for  
Better Engagement



Westgate Resorts sells approximately 80,000 Timeshares and other Vacation Membership contracts each year, so efficient closings are paramount. The company replaced its paper-heavy mortgage closing process with a Windows-based application running on the Microsoft Surface Pro 3. Westgate Resorts then sends customers home with their own Windows-based tablets, through which it relays offers and announcements throughout the year. By replacing paper with electronic efficiencies, Westgate Resorts has enhanced both sales efficiency and customer engagement.

## Improve closings for everyone

Damon Mauro taps his fingers nervously as the printer grinds away, printing the 40 multipage forms needed to complete the sales closing. He glances into the adjacent room: the family buying the timeshare is anxious to get to the nearby theme park. The mom glances at her watch. The kids squirm. Mauro sighs. Another 20 pages to go.

Mauro is a closing agent for Westgate Resorts, one of the largest resort developers in the world, with timeshare and vacation properties across the United States. Until recently, all of the company's nearly 80,000 annual closings proceeded along a paper path, requiring agents to print, review, sign, and ship more than 40 documents. Preparing these documents took time, which slowed down the process and tested buyers' patience.

"The process worked, because we've closed tens of thousands of timeshares that way, but we knew that there had to be a better way," says John Willman, Treasurer and Vice President of Mortgage Services at Westgate Resorts. "Our original goal in moving to electronic closings was to become more efficient in the back-office work—printing, scanning, shredding, and filing all that paper and then shipping loan documents all over the country to custodial agents, title agents, and county recording offices. But as we developed the idea, it became equally important to make the transaction easier for the customer."

"By replacing our paper-based closing process and marketing efforts with Windows-based mobile solutions, we've made our sales closing process far more efficient and our relationship with our customers far richer."

John Willman, Treasurer and Vice President of Mortgage Services, Westgate Resorts



**WESTGATE RESORTS**

**Company:** Westgate Resorts

**Website:** [www.westgateresorts.com](http://www.westgateresorts.com)

**Country:** United States

**Industry:** Professional services—Real estate

**Employees:** 9,000

### Company profile:

Westgate Resorts is one of the largest timeshare and hospitality companies in the United States, with more than 13,500 villas and 28 resorts in seven states

### Software & services:

- Windows 8.1 with Bing
- Windows 8.1 Enterprise
- Microsoft Azure

### Hardware:

- Microsoft Surface Pro 3 with Intel® Core™ i3 processor
- Microsoft Surface 3 with Intel® Atom™ processor Z3000 Series

**Partners:** [Informa Software](#), [Teknikos](#), [Intel](#)



Customer Success Stories

For more information about other Microsoft customer successes, please visit:

[www.customers.microsoft.com](http://www.customers.microsoft.com)

## Electronic closings far more efficient

For ideas, Westgate Resorts turned to longtime software partner Informa Software, a company that develops document management and process automation solutions. Informa suggested, and wrote, a custom electronic closing application for Westgate Resorts called eDocs. It runs on and takes advantage of the Windows 8.1 Enterprise operating system and incorporates DocuSign electronic signature technology and eOriginal electronic asset management software.

Today, when a Westgate Resorts closing agent sits down with a buyer, he or she brings a Microsoft Surface Pro 3 and a Surface 3 to the table, a presenter tablet and a signer tablet. Both run eDocs, which provides workflow, electronic signature support, and document security. The agent and buyer walk through the documents together, with the buyer signing digitally where appropriate.

While the buyer is signing one document on his device, the agent is pulling up the next while also monitoring the buyer's progress. The closing agent maintains complete control of the process, commanding both the buyer's focus and the signing activity. When the process is complete, Westgate Resorts provides the buyer with a copy of all the signed contracts on either a USB drive or a CD.

"We chose Windows as the foundation for eDocs, because we wanted the rich, touch-enabled experience that it provides," Willman says. Closing agents use the Surface Pro 3 digital pen to circle information on screen, use their fingers to scroll through documents, pinching and zooming when needed. The mobility of the Surface Pro 3 is important, too, because agents travel between multiple closing rooms each day.

The Surface Pro 3 is powered by the 4th generation Intel® Core™ i3 processor and the Surface 3 by the Intel® Atom™ processor Z3000 series. "Intel processors provide the performance needed to ensure that there will be no hiccups in the closing process," Willman says. "The broad Intel processor family also lets us select the right device for the job."

With its new electronic closing process, Westgate Resorts has greatly reduced errors such as missing signatures. Additionally, Westgate Resorts estimates that it will reduce paper-related costs by more than US\$580,000—the cost of buying, printing, shipping, and storing 1.8 million sheets of paper annually.

## Improve customer engagement during and after the sale

When the closing is complete, the agent hands the buyer his or her very own Westgate Resorts–branded tablet (powered by the Intel Atom processor Z3000 Series) to take home. This tablet is preloaded with a custom Windows Universal Application, developed by partner Teknikos. The Westgate Resorts Owner Application uses native Windows 8.1 features including live tiles,

toast notifications, secondary tiles, and OAuth integration. Users use the tablets to manage their resort ownership, browse the resort catalog, and learn more about resort services. The owner tablet runs the Windows 8.1 with Bing operating system, which gives Westgate Resorts owners the full power of a Windows-based PC along with a one-year Microsoft Office 365 license.

Previously, Westgate Resorts presented new owners with a leather-bound portfolio full of printed marketing collateral. However, this portfolio typically ended up on a shelf at home, where it collected dust. Consequently, the only time Westgate Resorts had contact with owners was when their payments were due or when they visited the resort once a year.

With a Westgate Resorts tablet in every owner's home, the company uses Microsoft Azure Notification Hub to push notifications to them throughout the year—about special events in their region, cruise offers, and special vacation packages.

That's not all. Westgate Resorts captures anonymous owner interactions with the owner application using Microsoft Azure Event Hubs and uses other Azure big-data services to analyze the data and determine which communications owners are clicking on and how much time they're spending on them.

"Owner tablets are a real success for us in increasing engagement with property owners throughout the year," Willman says. "We have various referral programs, where owners receive benefits for bringing friends and family to Westgate Resort events, and we can promote these programs far more effectively with an interactive tablet than we can through the mail. Using Azure big-data services, we can continuously improve our communications."

The owner tablets may also reduce rescissions. "We can use these tablets to communicate with new owners during the rescission period and affirm to them the value of their purchase," Willman says. "They can also use the tablet to show off their new property to friends and family and stay excited."

Westgate Resorts will hand out 50,000 owner tablets each year and will encourage its 350,000 existing property owners to download the owner application to their personal Windows-based devices so that they, too, can engage continuously with the company.

"By replacing our paper-based closing process and marketing efforts with Windows-based mobile solutions, we've made our sales closing process far more efficient and our relationship with our customers far richer," Willman says. "Both cast Westgate Resorts in a great light."