



# 100 Years of Service, Now Built for the Future

## Overview

MetroTex Association of REALTORS® is the fifth largest real estate trade association, focused on promoting success for their members and partners they serve through cutting-edge, innovative, and inclusive member-focused real estate resources. Based out of Irving, Texas, with over 100 years of service, MetroTex supports thousands of agents, brokers, and office managers.

## The Challenge

Given the thousands of members MetroTex supports, it's no surprise they manage a higher volume of back-office documents—applications, lease agreements, membership inquiries, letters of engagement, and more. While essential, paper, processing time, and storage added up in a negative way.

Paper forms require secure, on-site storage and significant staff time to organize, file, and retrieve. As MetroTex grew, these outdated processes slowed operations and hindered their goal of being a modern, impactful resource.

Pairing with their document woes was another challenge: workflows. Members and staff spent hours on emailed PDFs, printed forms, and error-prone processes, delaying approvals and risking data loss.

MetroTex knew they needed an upgrade to streamline operations and enhance the member experience—that's where onPhase came in.

Industry

**Associations**

Agents Served

**27K+**

Year Established

**1917**

Locations

**6**

Awards

**2023 Platinum Global  
Achievement Award**



# MetroTex Modernizes Member Services

“onPhase has been a game changer and a truly strong partner that has transformed how we work in our association.

**Ginny Haralson** - Chief Strategy  
and HR Officer | MetroTex

## The Results

onPhase's intuitive, automated Document Management solution began addressing many of the filing challenges MetroTex had been struggling with, working to better manage their unique documents and provide their members with improved service and support.

Digitizing MetroTex's key documents instantly transformed how they were handling these important items. Physical storage space was a thing of the past, now that these files could all be uploaded to onPhase's cloud-based system, **reducing the risk of filing errors and on-premise data breaches**. This change also made it significantly easier for staff members to store, retrieve, and organize realtor and member data.

After their success with Document Management, MetroTex chose to bring on another of onPhase's automated solutions, **Forms and Workflows**. This addition eliminated their use of PDFs and emails for form transmission. Now relying on easy to build web forms, data collection, member approvals, member management, and delivery was now scalable for their growing member base.



## Results at a Glance

**24**

custom forms created by onPhase to improve MetroTex's operational workflows.

**100%**

reduction in physical storage needs.

**Eliminated**

PDFs and emails for form transmission, replacing them with intuitive web forms.

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