Customer Intelligence Promotional Journey

Table of Contents

Journey Emails

Below you will see an outline of the 8 emails in the Customer Intelligence Promo Journey, including the name of the email in Total Expert, the subject line, the body of the email, and the video link. Please review all the emails to ensure they make sense for your organization.

CI Promo: Intro to Customer Intelligence

Subject line: Introducing: Total Expert Customer Intelligence!

Body:

Hi {{recipient.f_name}}!

We're thrilled to announce the upcoming launch of **Total Expert Customer Intelligence**! This powerful tool will continuously monitor the contacts in your database and alert you when key events occur, including:

- **Mortgage Credit Inquiry Alert**
- **Credit Improvement Alert**

- **Rate Alert & Rate Enrichment**
- **Equity Insight & Equity Enrichment**
- **Property Listing Alert**

Watch this short video from Total Expert founder and CEO Joe Welu to learn more about Customer Intelligence and what you can expect when we go live!

Video link: https://totalexpert.wistia.com/medias/kg6lx1dnim

CI Promo: Credit Inquiry Alert

Subject line: Customer Intelligence: Mortgage Credit Inquiry Alert

Body:

Hi {{recipient.f_name}}!

One of the valuable alerts you'll have access to with Customer Intelligence is the **Mortgage Credit Inquiry Alert**. This alert notifies you whenever a contact in your Total Expert database undergoes a hard mortgage credit pull with a competing lender or bank. This insight allows you to recognize when a customer is shopping for a mortgage, giving you the opportunity to proactively reach out and retain their business.

Click the video below to learn more about the Mortgage Credit Inquiry Alert and best practices for leveraging this information effectively.

Video link: https://totalexpert.freshdesk.com/support/solutions/articles/22000281171-mortgage-credit-inquiry-alert-quick-hit-video

CI Promo: Credit Improvement Alert

Subject line: Customer Intelligence: Credit Improvement Alert

Hi {{recipient.f_name}}!

The **Credit Improvement Alert** notifies you when a contact in your database, who previously had a low credit score, has now met your company's minimum threshold for lending.

Once you get the alert, we will begin to communicate with the client on your behalf, but it is a good idea for you also to personally re-engage with the customer at this point.

Watch the quick best practice video below to learn more about how the **Credit Improvement Alert** works!

Video link: https://totalexpert.freshdesk.com/support/solutions/articles/22000290166-credit-improvement-quick-hit-video

CI Promo: Firm Offer of Credit (FOC)

Subject line: Customer Intelligence: Firm Offer of Credit (FOC)

Body:

Hi {{recipient.f_name}}!

When monitoring a consumer's mortgage credit activity, **FCRA compliance** requires lenders to send a **Firm Offer of Credit (FOC)** when notifying a borrower of that activity. This is typically done via email or physical mail through an FOC letter.

When a **Credit Alert** or **Credit Improvement Alert** is triggered, Total Expert will first attempt to send the **FOC letter by email**. If the email is unsuccessful, the letter will then be sent via **physical mail**. If the FOC postcard is mailed, you'll be able to preview it within the **contact record** in Total Expert.

Total Expert's FOC postcards are beautifully branded and personalized, featuring a QR code that, when scanned, prompts the contact to click to dial your phone number. This creates a new opportunity for you to engage with potential customers and drive business.

Watch this quick video to see a preview of the FOC postcard in the platform!

Video: https://totalexpert.freshdesk.com/support/solutions/articles/22000283794-firm-offer-of-credit-foc-quick-hit-video

CI Promo: Equity Insight & Enrichment

Subject line: Customer Intelligence: Equity Insight & Enrichment

Body:

Hi {{recipient.f_name}}!

With **Customer Intelligence**, Total Expert will send you an **Equity Alert** when a homeowner in your database has built enough equity in their property to potentially benefit from options like a **Cash-Out Refinance, HELOC, Reverse Mortgage, MI Removal,** or other financing solutions.

Beyond meeting the equity thresholds that trigger an alert, you'll also gain insights into key equity datapoints like **Property Value, Estimated Unpaid Principal Balance, Estimated Loan-to-Value,** and **Total Accumulated Equity** so that you easily identify equity opportunities within your database by sorting and filtering your contacts based on different sets of equity criteria.

These values automatically update weekly, ensuring you always have the most current equity data to guide your conversations.

Learn more about Equity Alerts below and how to put these insights to work!

Video link: https://totalexpert.freshdesk.com/support/solutions/articles/22000281174-equity-insight-enrichment-quick-hit-video

CI Promo: Rate Alert & Enrichment

Subject line: Customer Intelligence: Rate Alert & Rate Monitoring

Body:

Hi {{recipient.f_name}}!

With **Customer Intelligence**, you'll now receive **Rate Alerts** when a customer's current interest rate presents a strong enough benefit compared to market rates—giving you the perfect opportunity to reach out and discuss potential **Rate and Term Refinance** options.

In addition to meeting the rate threshold that triggers an alert, we'll enrich the monitored contact records with valuable rate data, including:

- **New Rate**
- **Rate Difference**
- **Monthly Savings**
- **3, 5, and 10-Year Savings**
- **New Monthly Payment**, and more!

These insights help you uncover prime **refi opportunities** within your database.

Watch the quick video below to learn best practices for leveraging **Rate Alerts** and **Rate Monitoring data** effectively!

Video link: https://totalexpert.freshdesk.com/support/solutions/articles/22000281173-rate-alert-enrichment-quick-hit-video

CI Promo: Property Listing Alert

Subject line: Customer Intelligence: Property Listing Alert

Body:

A **Property Listing Alert** notifies you when a client in your database has listed their property within the past seven days. This insight presents a great opportunity to reconnect with the client—or even the listing agent—to discuss any potential financing needs.

Watch the quick video below to learn how to maximize **Property Listing Alerts**!

Video link: https://totalexpert.freshdesk.com/support/solutions/articles/22000281172-property-listing-alert-quick-hit-video

CI Promo: Launch Email

Subject line: Customer Intelligence is LIVE!

Body:

Hi {{recipient.f_name}}!

The wait is over—**Customer Intelligence is now LIVE** in Total Expert! Starting today, you'll begin receiving **Customer Intelligence alerts** to help you identify key opportunities in your database.

When you get an alert, be sure to **log in, review the opportunity, and take action**. Also, don't forget to **review and mark outcomes** for any CI tasks to keep the automation running smoothly.

To make sure you are ready to go, click the link below to complete a short training course on **Customer Intelligence**.

Link: https://totalexpert.freshdesk.com/support/solutions/articles/22000284170-customer-intelligence-alerts-for-end-users

If you have any questions, please reach out to the marketing team!

Best Practices for Journey Customization

Journey Framework

- **Edit the date delay triggers (2) to the day you want this journey to deploy and the day you are launching to your organization.**
- Edit the timer delays to space out your emails—we recommend promoting the product for 2 weeks before launch.

Email Customization

- Review all the emails and **omit any emails that do not make sense for your organization.**
- Customize the email copy to your organization's voice and feel.
- Add in customized videos to each of the emails.
- Leverage an executive champion at your organization to record a video for the launch email.
- Be sure to edit any copy that is highlighted in red before you deploy the journey.

Deploy the Journey

- End users will be considered "contacts" in the Marketing Admin profile.
- Upload your end users as contacts using the data importer and add them to a specific group. Use that group as an on-ramp to the journey.