Welcome to the ROI Fast Lane

Customer Playbook

Drive. Value. Faster.

We're rewriting the rules of software deployment to make a your business more successful — and your life easier.

You've lived through some troublesome software engagements. Deployment was disruptive and getting to value took months – or sometimes, never happened at all. We're here to tell you, it doesn't have to be that way. Modern software platforms, like Total Expert, reverse the backwards formula of you adapting to software. Instead, our platform adapts to you.

Total Expert is a modern platform that enhances your business processes and provides next-level functionality that elevates key metrics for your entire operation. Very quickly, your salespeople will sell more. Operations people will fly through processes with fewer errors. And senior leaders will unlock consistent access to actionable data that informs more profitable decisions.

For organizations that have struggled to make use of cumbersome platforms in the past, that's pretty transformational by itself. But what makes Total Expert a true game-changer is the speed at which the platform delivers value. We're talking less than half the time of a standard We're talking less than half the time of a standard SaaS platform – and light years faster than any software you deploy and manage yourself.

This is the value of Total Expert Professional Services. We get you to value faster.

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Process Overview: Four Phases

An Accelerated Path to Value

We know we can get you to value quickly, partly because we've developed a refined process that keeps us focused on what matters. Here are the four phases of the implementation process that will be led by the Total Expert Professional Services team.

1. Design & Discover → 2. Build → 3. Train & Test → 4. Deploy

Activities & Work Products

We know we can get you to value quickly, partly because we've developed a refined process that keeps us focused on what matters. Here are the four phases of the implementation process that will be led by the Total Expert Professional Services team.

- Define Success Metrics
- Project Kickoff
- Workflow & Content Review
- Project Plan Review & Sign-off
- Define MVP Journeys
- Deployment

- Data Mapping & Integrations
- Contact & Data Imports
- Content Configuration &
- Creation
- System Configuration
- Admin Training

- Campaign Workshop
- Validation
- Readiness Assessment
- Pilot Rollout
- Campaign Reporting

- Solution Go-Live
- Transition Process to Customer Success Go-live
- Long-Term Support Plan
- On-going Innovation & Feature Roll-out Process

Making It Yours

It Starts Here: Key Prep Questions

We knowThis is the first step that ensures software is configured to meet each customer's needs and use cases, not the other way around. In this preparatory step, we ask that you gather input from all relevant users — marketing, sales, operations, compliance, IT and senior leadership. Then, your Total Expert Professional Services team will use these insights in combination with best practices from working with hundreds of customer implementations to help you configure the solution and get your users up and running quickly.

Business Goals & Key Metrics	Business Channels	Pilot Plans & Initial Users
User Profiles & Authentication	Print Management Workflows	
Business Goals & Key Metrics	Key Integrations: Current & Future	Pilot Plans & Initial Users
Security & User Authentication	Social Media Accounts	

*For a full list of prep questions, please contact the PS team.

Building Your Team

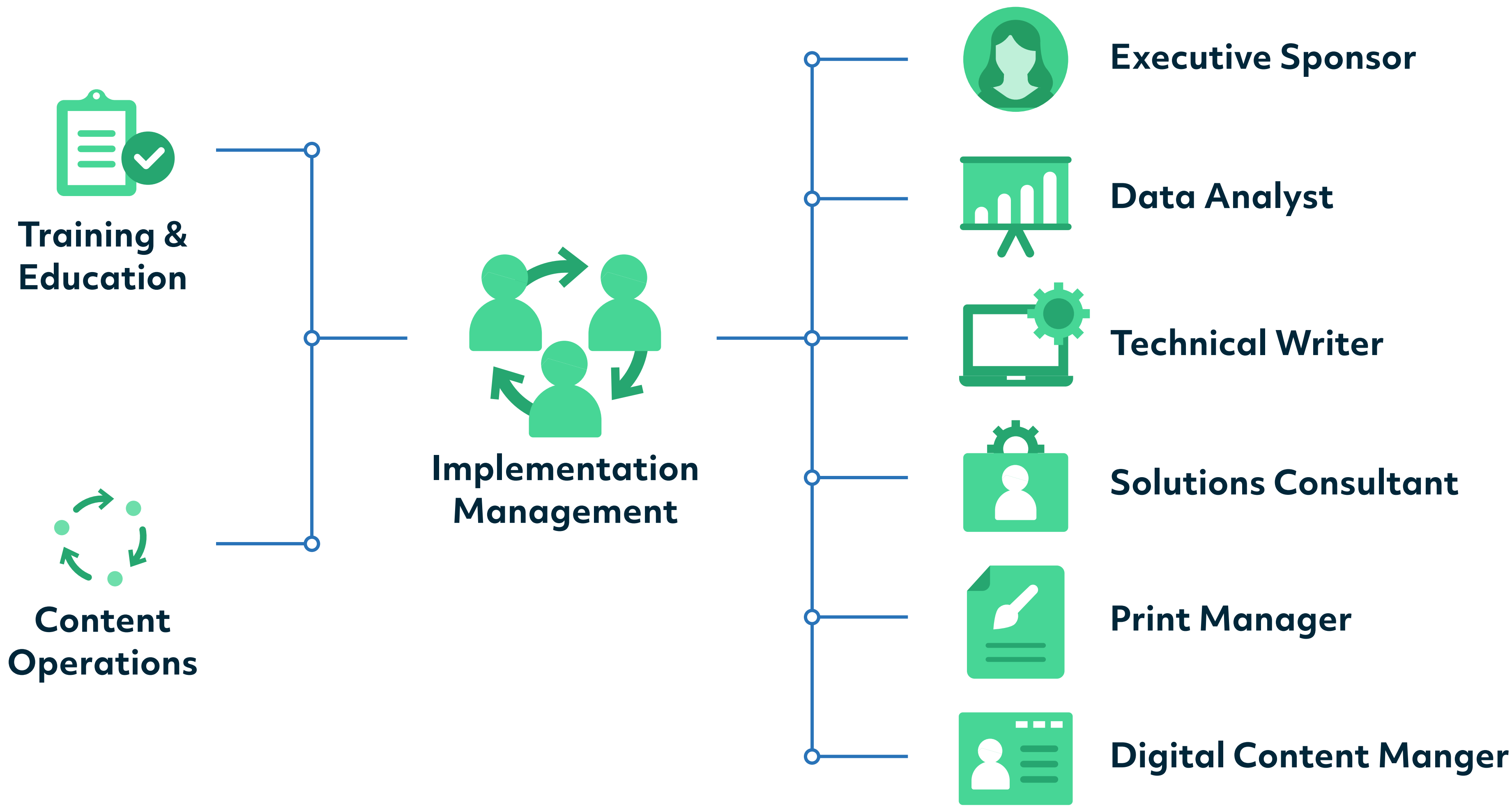
One Champion & Broad Representation

A key differentiator of Total Expert's end-to-end platform is that it elevates the performance of workers across all roles — from sales and marketing to IT and compliance. Another differentiator is that our Professional Services team drives real, measurable value (and ROI on your investment) quickly. This means you need full representation and participation in all phases of the program. Follow this chart when deciding how to build out your team.

Accessing Our Team

Experts By Your Side for Every Step

The single biggest reason we're able to drive value and ROI so fast — our Professional Services team has done this before. We bring best practices to every engagement that have been built and refined over hundreds of successful deployments. You can count on our team for everything from high-level strategic leadership to specific user training.



Implementation Prep

Best Practices for You. And Us.

This requires some time and effort from your team, but it will be worth it. If we have these items in place when we begin our engagement, we know the path to full value will be sure and fast. See the checklists below for templates you can use to prepare.

Organizations

Follow our guidance for building your team.
See page 6 of this playbook for team structure.

See Checklist

Users

Identify all users, map their current needs and identify stretch performance goals.

See Checklist

Contact/Loan Data

Identify relevant data and map how it will move from current systems to the new platform.

See Checklist

Content

Create an inventory of current content and wish list for new pieces. Create priority list for rollout.

See Checklist

Change Management

Everyone Onboard: Driving Value Together

Modern software deployment is less about technology and more about people, process and user experience. The underlying technology has to be great — gamechanging even. But the beauty of a modern platform like Total Expert is that no user needs to understand the technology. The experience is simple and intuitive. But getting to value quickly still requires change management. For the most part, it's not about changing how people do their jobs: it's about getting them to think bigger and helping them see the new possibilities offered by the platform.

Change Management Best Practices

Campaign Launch	Communication Plan
Pilot Group	End-User Training
Full Rollout	Content Creation
Customer Campaigns	End-User Q&A

Post-Implementation Tips

Evolve Your Platform & Increase the Value.

One thing to remember during your deployment: this is just the beginning. As users become familiar with the platform, they will likely want to add features and capacity. The same is true for integrations. The partners you choose can likely be integrated with the platform using APIs. Also, Total Expert will continue to develop new features, which — as an SaaS user — you can deploy as soon as they become available. Your Professional Services team can provide you with best practices for monitoring your changing needs and scaling the platform to include additional postlaunch services as needed.

Capabilities at Launch:

On Day 1, your team will have a handful of campaigns, content and users in place to hit the ground running.

↑↓

Capabilities Post Launch:

Over time, additional engagement with your CSM will create new opportunities to deploy additional functionality, new campaigns and powerful strategies to build on early results and align with key goals.

TotalExpert

Launch Calendar

A Template for Accelerating ROI

Successful launches with clients of all sizes tells us that a 12- to 16-week schedule is a best practice for launching the Total Expert platform. This timeframe allows for all of the necessary steps, but also keeps your team — and ours — focused on delivering value and getting to ROI quickly.

1. Design & Discover → 2. Build → 3. Train & Test → 4. Deploy

Configuration and Technical Support

Project Management and Professional Services

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Be Prepared

Implementation Checklist

Implementation Checklist: Step #1

Organizing Your Team for Onboarding Success

The secret to standing up a transition process that helps your organization unlock Total Expert's game changing CX in record time? It all starts with the right team. To help your organization put the right team in place, we've created a checklist—built on hundreds of similar engagements—to streamline your onboarding process and squeeze even more value out of the implementation process.

Start with Your Point Person - The overall point person on your team will serve as the fulcrum between your Total Expert support team and the internal team that will manage the platform moving forward. This individual will also serve as the subject matter expert for your project's implementation manager and customer success manager to tailor your implementation to serve your organization's unique needs. Select a point person who can help bridge the gap between the business, marketing and operations requirements within your organization.

Identify Which Individuals Will Be Working to Administer TE - Your Total Expert solution is designed to have a big impact—which means it will touch many of the different business units in your organization. Within each department, consider which individuals will be responsible for implementing and managing your TE solution across marketing, compliance, data management, and content.

Define Business Unit Goals - How the rollout process unfolds is up to you. It's important for your team to take the time to define business goals and objectives before we get started to ensure the rollout strategies and communication cadences we leverage meet your expectations before, during and after implementation. When laying out these plans, consider how other recent software implementations have gone, and what could have been done differently.

Create an Internal Reference Page - During the implementation process, your employees are sure to have questions—how to use the new tools, how long the implementation will take, how to get the most out of the solution. An internal reference page on your organization's server or intranet can serve as a powerful, one-stop-shop to give your employees the FAQs, trainings and reference guides they need to be successful

Ready for Additional Guidance?

Reach out to your Total Expert Professional Services team leads to get more information about how your planned implementation process will be tailored for your organization to achieve success.

Implementation Checklist: Step #2

Setting Up Your Organization's User Provisioning Workflow

In order to take advantage of everything the Total Expert platform can offer, employees across your organization will need to have user access to unlock the data insights, marketing automation and seamless compliance features that will be built into your onboarding engagement. Here are a few best practices to help you get started as you navigate the who, how and when of your user provisioning process..

Identify All Potential Users - Positions that may need access to the TE platform include salespersons, support staff (Loan Officer Assistants and Coordinators), administrative staff in marketing, compliance and end user support, and brand and regional bank managers.

Pinpoint Key Access Points for Each Business Unit - Your Total Expert solution is designed to have a big impact—which means it will touch many of the different business units in your organization. Within each department, consider which individuals will be responsible for implementing and managing your TE solution across marketing, compliance, data management, and content.

Inventory and Consolidate Data Sources and Systems - Take inventory of the different systems that store important user information and begin to consolidate as much as possible. Sources of data to consider include demographic information, loan officer websites, state licensing, employee headshots, social media profiles, etc.

Identify Pilot Group Users - To ensure each Team grouping has the proper permissions and functionality, select a pilot group of users across the organization to test performance. Best practices recommend selecting approximately 5-10% of your user base across a variety of roles.

Create Unique Identifiers for Each User - Unique identifiers allow your users to login to both your TE solution and external systems and integrations through one login. For added protection and simplicity, consider deploying a Single Sign On (SSO) authentication solution to manage logins across systems.

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Implementation Checklist: Step #3

Migrating Loan and Customer Data

As your organization reimagines its customer lifecycle to create a more seamless end-to-end experience, it's important to consider how existing systems and data sources will work together to support lead generation, application submission, loan origination and post conversion nurture. Here are a few aspects of your data infrastructure strategy to take into account as you move toward the desired end state.

Start with an Understanding of Your Data Flow - Determine the direction of data between systems. More specifically, does your data flow through systems via a one-way push or pull or does data flow in both directions? If data is coming from multiple sources, decide which system will operate as the system of record moving forward.

Identify and Export Historical Data - Once you've determined where and how historical loan and contact data is entering your system, it's time to export that data out of your existing CRM. As you do this step, take care to make sure you go back far enough—ensuring LOs and customer service teams have all of the data they need to serve your current customer base.

Clean and Standardize Data as it is Imported - Start with your organization's current deduplication rules and review Total Expert's deduplication logic. As you begin to import data into the new system, ensure that it is consistent—not incomplete or containing placeholder records. Examples of incomplete records include contacts with no email, no last name or faked data to satisfy previous system requirements. Total Expert can provide standard templates (for importing contacts, loan data, users, etc.) upon request.

Establish Go-Forward Contact Data Logic - At this point, you will want to decide how contacts you are migrating to your new system are going to be classified from an organization perspective. If there are universal naming conventions your team already has in place (ex. lead, client, past client), you can use those as a starting place to streamline this process. Also, consider if there are other participants on the loan record, such as listing agents and attorneys, that should be created as contacts and receive communications as well.

Ceate a Corporate Policy for Data Ingestion - Establish which types of files and data loan officers can import into Total Expert. Then set up a training strategy to onboard new loan officers and give them the information they need to execute these data import strategies. Your organization may want to create an internal role within the marketing or IT teams that reviews all files prior to submission.

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Implementation Checklist: Step #4

Brainstorm Content Goals and Implement a Strategy

Even timely data insights and carefully orchestrated campaigns can't drive high-impact results without the right content to back it up. As an important final step in the implementation process, consider how content offers and marketing messages will interact with your desired demand- and lead-generation strategies. Start by using these tips to begin exploring the capabilities of Total Expert's Expert Content library.

Take Inventory of Assets and Usage – Which content pieces, topics and delivery strategies have created the most success for your organization? If you have access to usage statistics, such as downloads or views, these can be a great place to start as you look to understand what types of content you will want to use moving forward.

Compile a Wishlist of Content You Would Like to Have – As you look through your existing content library, you will likely come across assets that may need updating or that may inspire a fresh take on an old topic. Review the Total Expert Expert Content Library to gather ideas and see if any of these materials already exist for use. For those that don't exist, begin the design and creative process to integrate them into your new library of materials.

Create a Shared File System of Collaborating with Total Expert – Work with your technology team to create a shared file (ex. Dropbox) that can be utilized for sharing marketing designs and brand information with Total Expert.

Prioritize Assets That Will Be Needed at "Go-Live" – Trying to put together a full content library by go-live would likely lead to unnecessary delays and postponed ROI. Through years of implementations, we've found the best approach is to select a few campaigns to finalize for go-live, while continuing to build out additional campaigns and assets behind the scenes. Decide with content pieces make sense to tackle first. Factors to consider might include seasonal trends or heavily used print pieces.

Make Any Brand Updates and Standardize Layout Templates – Often times, our customers will use the decision to implement Total Expert as an opportunity to streamline their approach for marketing materials. If you are planning on doing any rework to your brand or change your asset design, please make sure to complete those changes before beginning the your implementation project. You won't want to be working on a rebrand and building content at crunch time – it may lead to mistakes or impact your go-live timeline.

Ready for Additional Guidance?

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About Total Expert

Total Expert is the leading fintech software company that delivers purpose-built CRM and customer engagement for modern financial institutions. Total Expert unifies data, marketing, sales, and compliance solutions to provide a cohesive experience across the customer lifecycle. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and other financial services firms.

TotalExpert.com