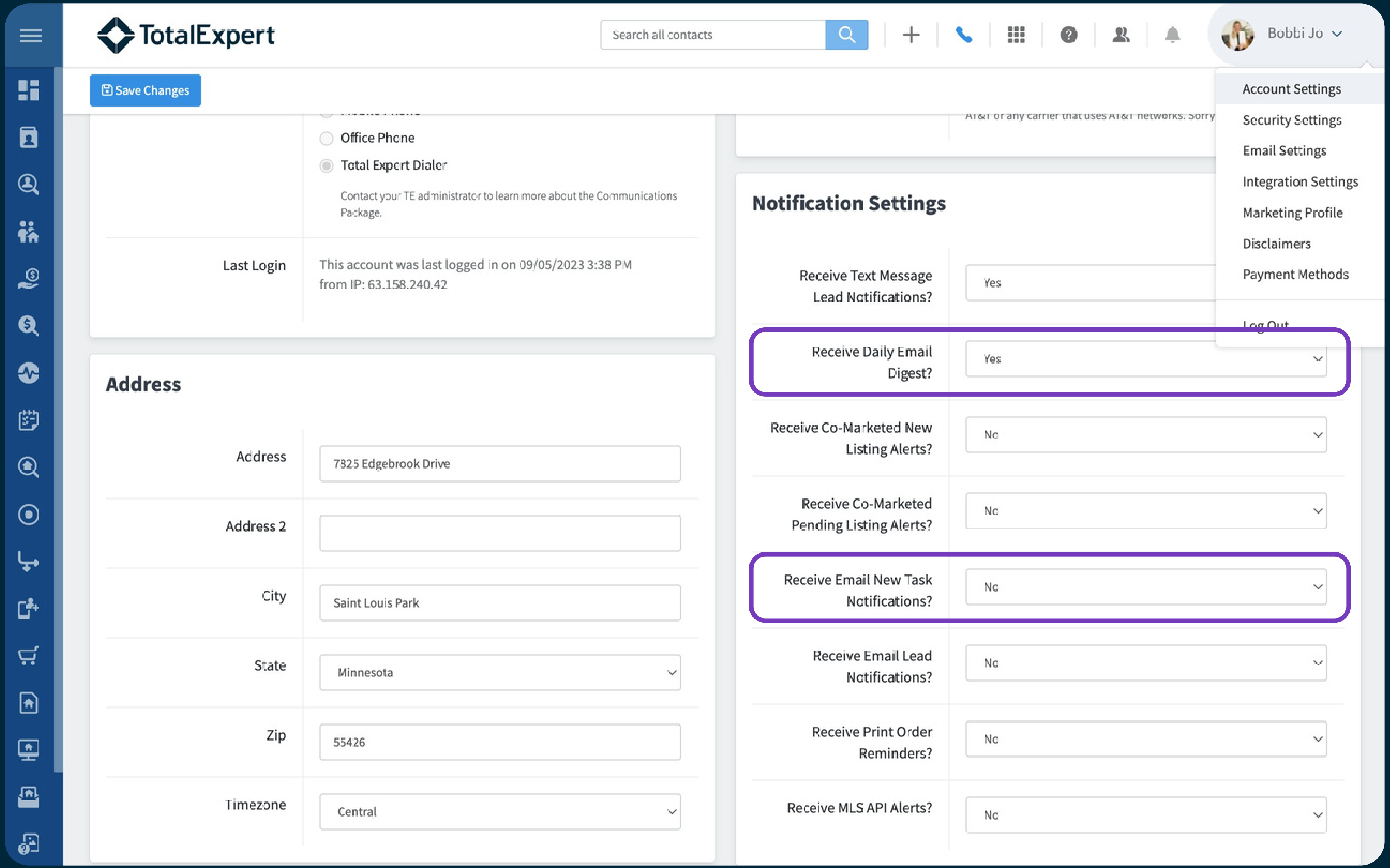
CUSTOMER INTELLIGENCE PLAYBOOK

TotalExpert

Set Yourself Up For Success

Ensure your Daily Digest and task notifications are turned ON in your account settings > notification settings



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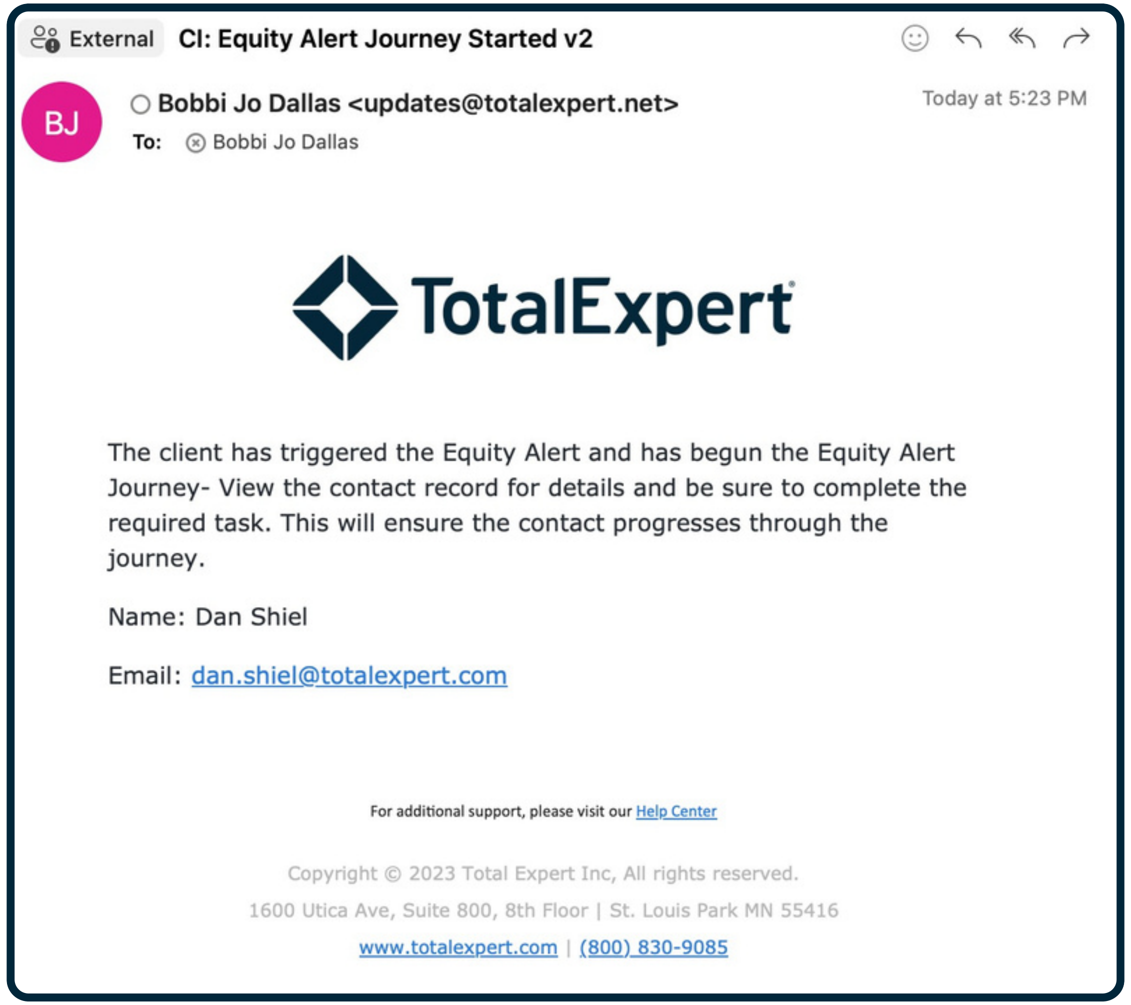
Recognize Customer Intelligence Alerts

1 Email notification when an insight is created and an alert is triggered



External CI: Equity Alert Journey Started v2

Bobbi Jo Dallas <updates@totalexpert.net>
To: Bobbi Jo Dallas
Today at 5:23 PM

TotalExpert

The client has triggered the Equity Alert and has begun the Equity Alert Journey- View the contact record for details and be sure to complete the required task. This will ensure the contact progresses through the journey.

Name: Dan Shiel

Email: dan.shiel@totalexpert.com

For additional support, please visit our Help Center

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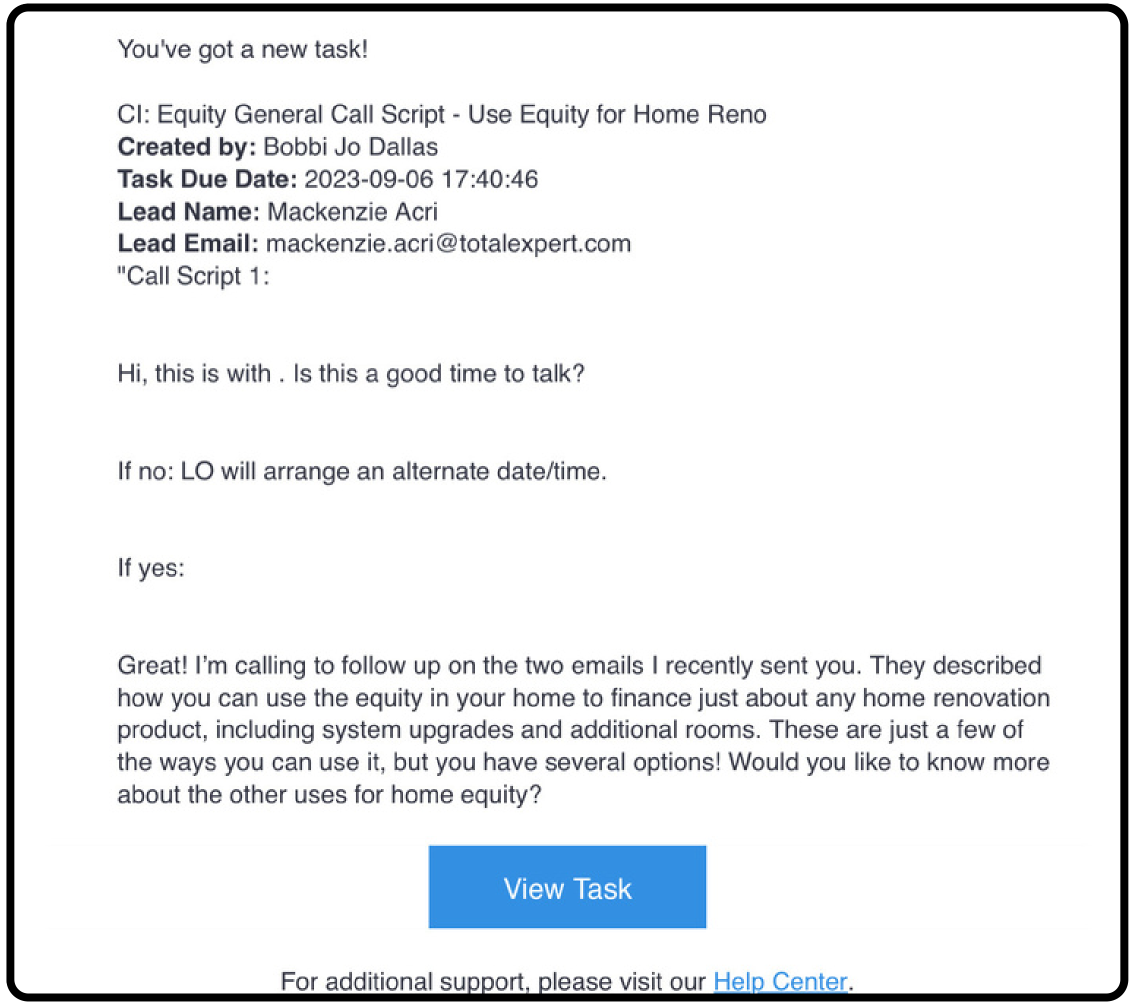
2 Task email notifications when a task assigned to you from a CI alert



You've got a new task!

CI: Equity General Call Script - Use Equity for Home Reno
Created by: Bobbi Jo Dallas
Task Due Date: 2023-09-06 17:40:46
Lead Name: Mackenzie Acri
Lead Email: mackenzie.acri@totalexpert.com
"Call Script 1:

Hi, this is with . Is this a good time to talk?

If no: LO will arrange an alternate date/time.

If yes:

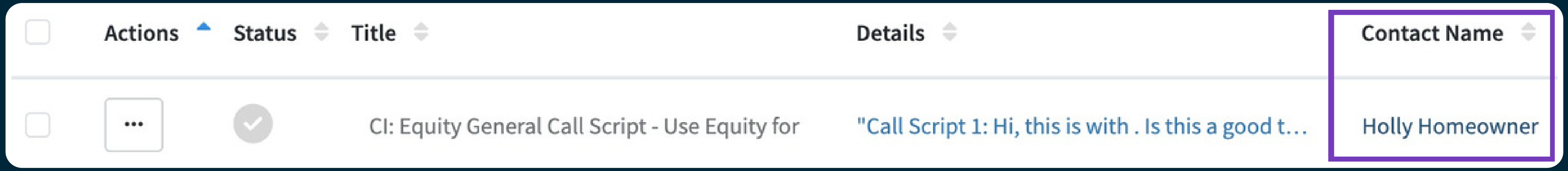
Great! I'm calling to follow up on the two emails I recently sent you. They described how you can use the equity in your home to finance just about any home renovation product, including system upgrades and additional rooms. These are just a few of the ways you can use it, but you have several options! Would you like to know more about the other uses for home equity?

View Task

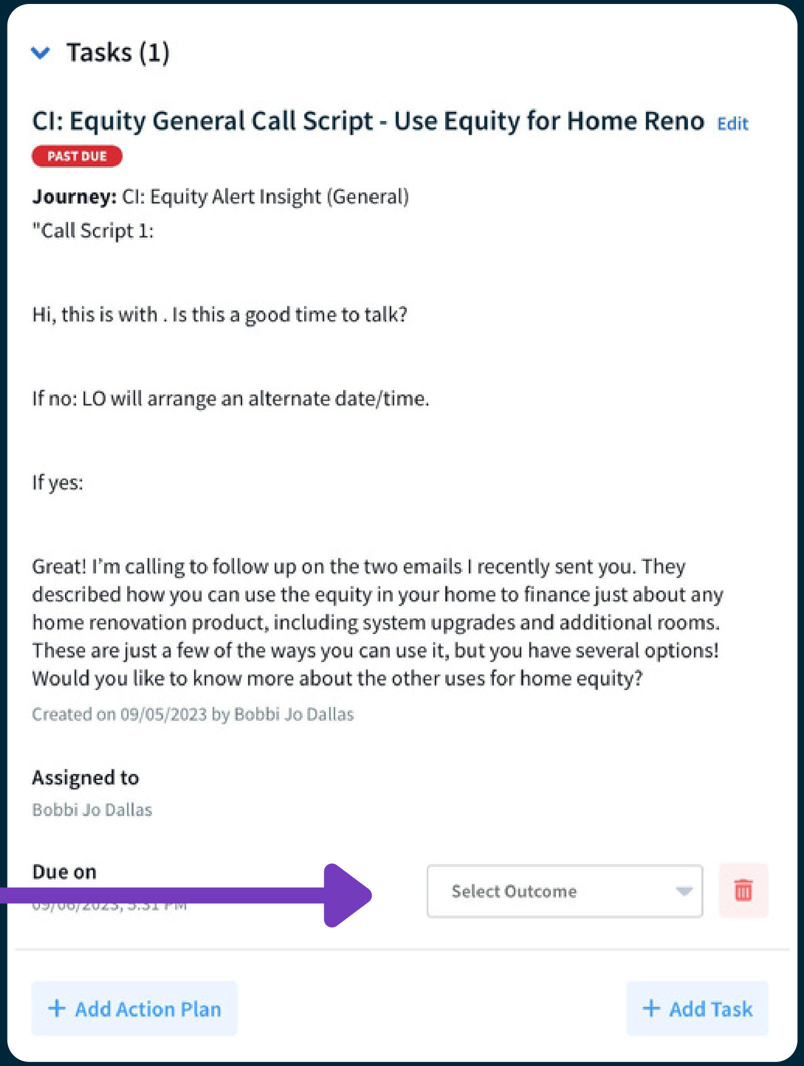
For additional support, please visit our Help Center.

What to do when you get a task notification?

- Click 'view task' on your email --> this should take you directly to the task in Total Expert
- Click on the contact name for the task

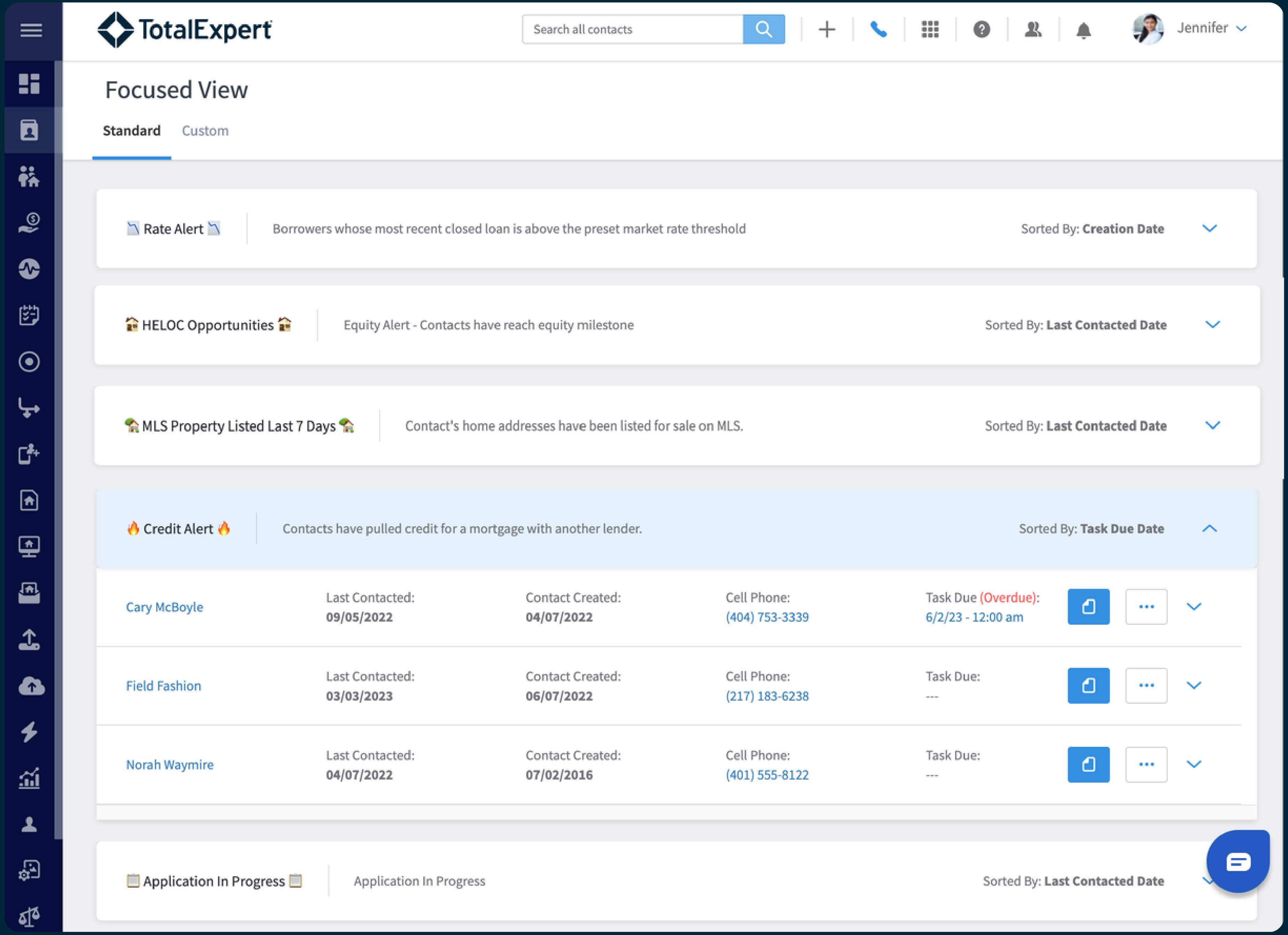


- View the details of the task on the right-hand side of the contact record
- Reach out to the client and select an outcome for your action
  - Note: When you select an outcome, the system automatically completes the task and will remove it from your task list



Leveraging CI Focused Views

- Contacts will automatically populate in Focused Views
- View and work all of your opportunities from one place
- Quickly make outreach, log calls, notes, and outcomes, and assign follow-up tasks - all from one screen



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