



# CUSTOMER INTELLIGENCE PLAYBOOK

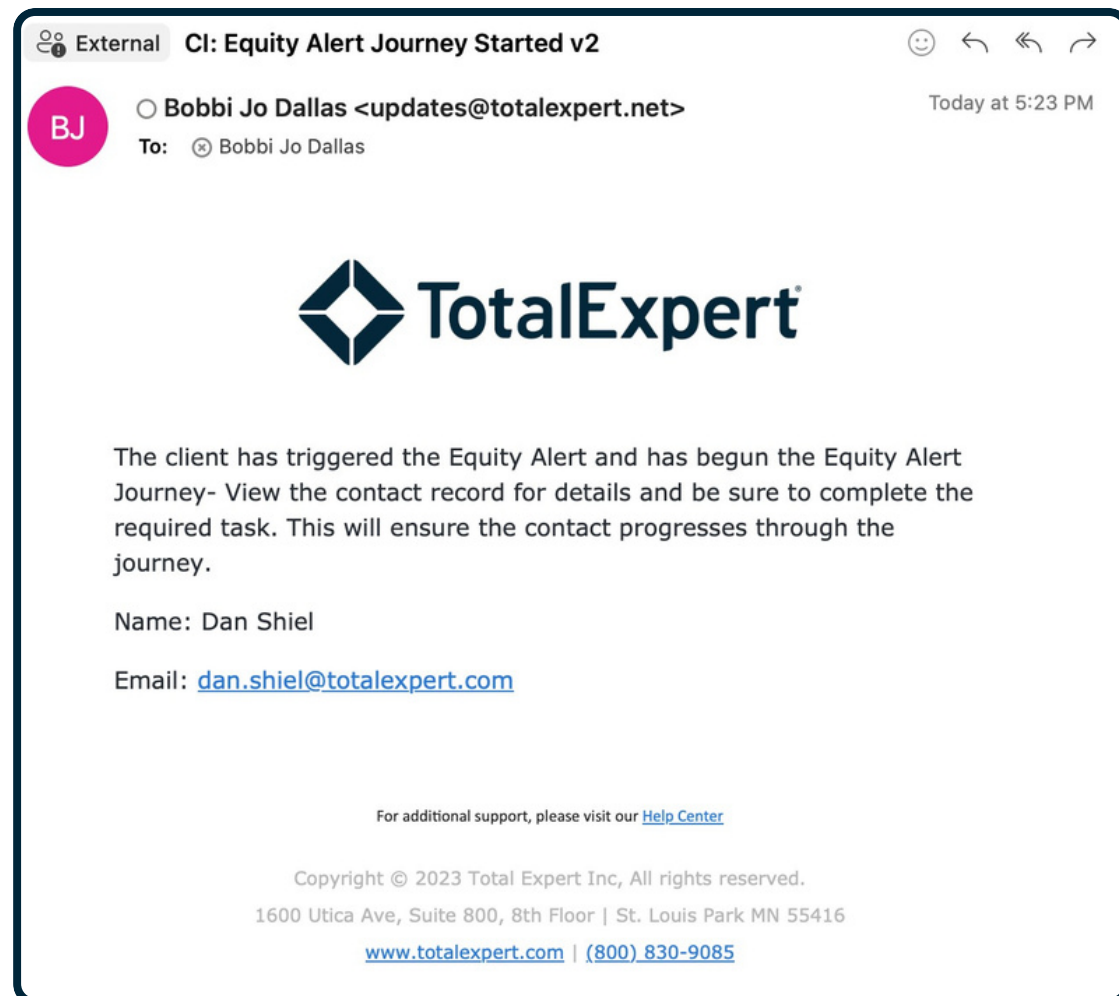
# Set Yourself Up For Success

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

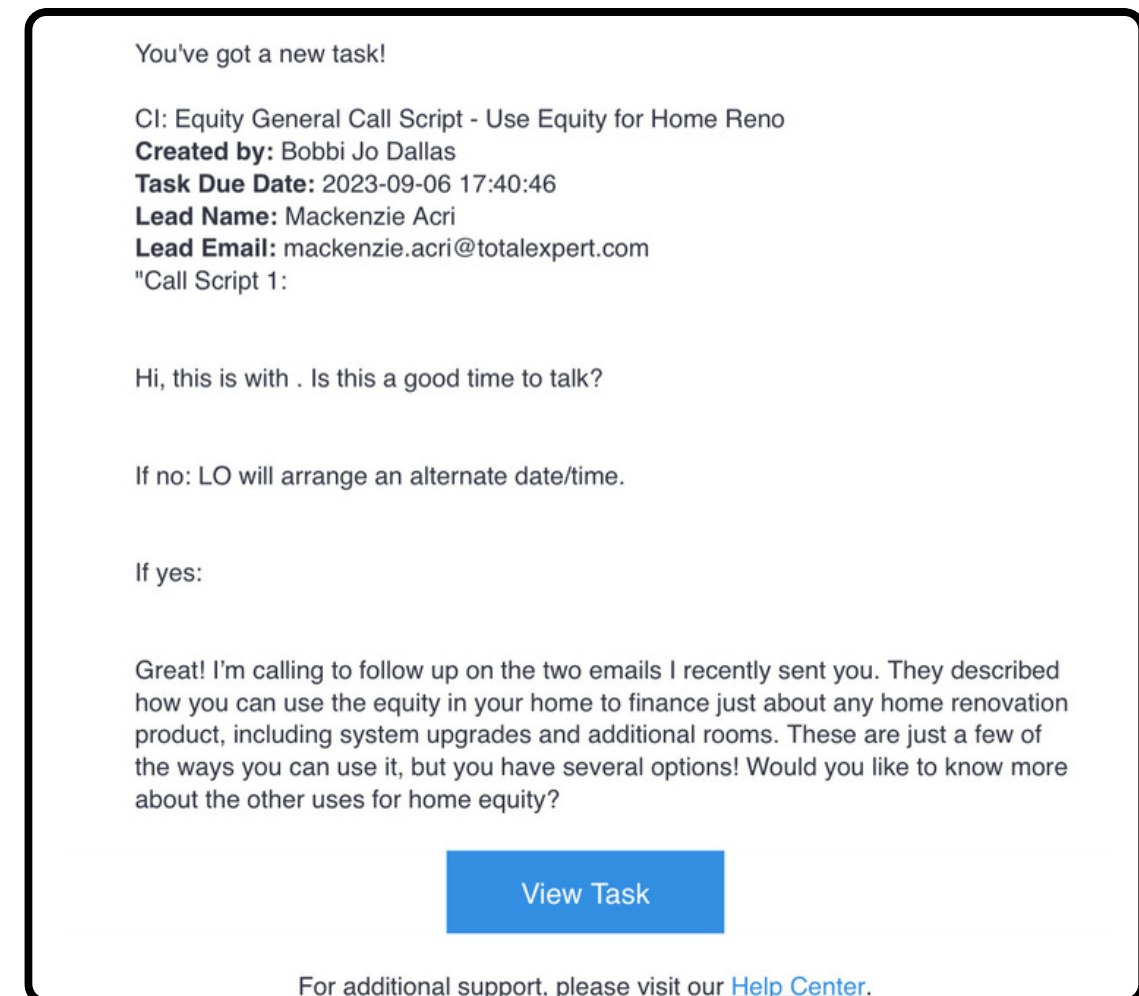
The screenshot displays the TotalExpert user interface. At the top, there is a search bar for contacts and a user profile for Bobbi Jo. The main content area is divided into several sections: a 'Save Changes' button, a 'Last Login' section indicating the account was last logged in on 09/05/2023 at 3:38 PM from IP 63.158.240.42, and an 'Address' section with fields for Address (7825 Edgebrook Drive), Address 2, City (Saint Louis Park), State (Minnesota), Zip (55426), and Timezone (Central). The 'Notification Settings' section is on the right, featuring a list of notification preferences. Two items are highlighted with purple boxes: 'Receive Daily Email Digest?' set to 'Yes' and 'Receive Email New Task Notifications?' set to 'No'. Other notification settings include 'Receive Text Message Lead Notifications?' (Yes), 'Receive Co-Marketed New Listing Alerts?' (No), 'Receive Co-Marketed Pending Listing Alerts?' (No), 'Receive Email Lead Notifications?' (No), 'Receive Print Order Reminders?' (No), and 'Receive MLS API Alerts?' (No). A dropdown menu is open on the right side, showing options like Account Settings, Security Settings, Email Settings, Integration Settings, Marketing Profile, Disclaimers, Payment Methods, and Log Out.

# Recognize Customer Intelligence Alerts

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



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



# 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

Actions	Status	Title	Details	Contact Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CI: Equity General Call Script - Use Equity for	"Call Script 1: Hi, this is with . Is this a good t...	Holly Homeowner

- 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

Tasks (1)

CI: Equity General Call Script - Use Equity for Home Reno [Edit](#)

**PAST DUE**

**Journey:** CI: Equity Alert Insight (General)  
"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?

Created on 09/05/2023 by Bobbi Jo Dallas

**Assigned to**  
Bobbi Jo Dallas

**Due on**  
09/06/2023, 3:31 PM

Select Outcome

[+ Add Action Plan](#) [+ Add Task](#)



# Leveraging AI 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

The screenshot displays the TotalExpert CRM interface. At the top, there is a search bar for "Search all contacts" and a user profile for "Jennifer". The main section is titled "Focused View" and includes tabs for "Standard" and "Custom". Below this, there are several alert cards:

- Rate Alert**: Borrowers whose most recent closed loan is above the preset market rate threshold. Sorted By: Creation Date.
- HELOC Opportunities**: Equity Alert - Contacts have reach equity milestone. Sorted By: Last Contacted Date.
- MLS Property Listed Last 7 Days**: Contact's home addresses have been listed for sale on MLS. Sorted By: Last Contacted Date.
- Credit Alert**: Contacts have pulled credit for a mortgage with another lender. Sorted By: Task Due Date.

Below the alerts is a table of contacts:

Contact Name	Last Contacted	Contact Created	Cell Phone	Task Due	Actions
Cary McBoyle	09/05/2022	04/07/2022	(404) 753-3339	Task Due (Overdue): 6/2/23 - 12:00 am	[Copy] [More] [Dropdown]
Field Fashion	03/03/2023	06/07/2022	(217) 183-6238	Task Due: ---	[Copy] [More] [Dropdown]
Norah Waymire	04/07/2022	07/02/2016	(401) 555-8122	Task Due: ---	[Copy] [More] [Dropdown]

At the bottom, there is an "Application In Progress" section, sorted by Last Contacted Date. A blue chat bubble icon is visible in the bottom right corner.

