

DAILY DIGEST

Drive 4x More Loans Using the Total Expert Platform Along with Daily Digest

Staying in touch with your leads and contacts is a critical part of capturing and retaining business.

Today, successful companies bring together marketing automation with human connections to deliver seamless experiences, engage customers, and build trust. But humans only have so much time for outreach, so it becomes critical to efficiently manage the workday. That's where a simple tool from Total Expert helps prioritize a loan officer's day to effectively build relationships at the right time.

Total Expert's Daily Digest is a daily email delivered directly to your loan officers' inboxes with a personalized summary of their specific activities, tasks, and appointments to help prioritize and make the most out of their day. On average, companies activating the Daily Digest see a 34% open rate among their loan officers, as it delivers the information they need quickly.

What's included in Daily Digest?

- Loan Officer Appointments
- Focused View and Tasks
- Email Activity
- New Contacts
- Key Borrower Milestones

"The Daily Digest is paramount for our team's success. Loan officers constantly on the go are delivered the top contacts they need to contact that day without having to manage it directly within the CRM,"

Michael Guidotti

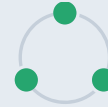
Vice President of Integration & Brand Technology, American Pacific Mortgage

Loan officers utilizing the Total Expert platform
and subscribed to Daily Digest see:



Productivity

4x more loan applications



Revenue

3.4% higher close rate

Why would a Loan Officer utilize the Daily Digest?

- **Save time** with the day's highlights in an individualized Daily Digest email.
- **Close more business, faster** with click-to-call phone numbers and email addresses for immediate action.
- **Never miss an opportunity to engage with leads** with clear insight into high-priority contacts and tasks.
- **Be better informed on a customer's experience** to know what communications support their unique financial journey.

"When the Daily Digest comes through, I just click on it – and send a personal email to anyone having a birthday or loan anniversary. It makes it easy for me to continue building relationships and stay in front of my clients."

Mark Taylor

Loan Officer, Alerus Financial

Daily Digest is included as part of the Total Expert platform.

It's easy to deploy, simple to use, and can quickly make a positive impact for your loan officers.