

TOTAL EXPERT | CUSTOMER ENGAGEMENT

# Onboarding Playbook

Marketing Administrator





## Congratulations, you are ready!

At Total Expert, best practices are at our core. As a Total Expert marketing admin, you are responsible for the configuration of the Total Expert platform. We've designed this guide to help set you and your organization up for success.

You'll find training resources throughout the playbook, as well as additional tools available via the [Engagement Resource Center](#). Let's get started!





## Welcome to the Total Expert Family!

Here at Total Expert, you have an entire team behind you. Your success is our success. We are here to be your advocates, partners, champions, and biggest fans.

*“At Total Expert, Customer Success is our #1 priority, and we are dedicated to not only meeting, but exceeding your definition of success.”* - Joe Welu, Total Expert

### CUSTOMER SUCCESS IS #1



**Customer  
Engagement**



Customer Outcomes  
Manager



Customer Success  
Manager



Customer  
Support



Content  
Coordinator



Training & Education  
Consultant

## Your Total Expert Customer Engagement & Experience Team

Total Expert offers something very different to our customers. The Customer Engagement and Experience team is an extension of the Customer Success department, and we are focused on helping you drive end user engagement to known best practices, resulting in measurable outcomes for your organization.

The Engagement Resource Center is an easy, one stop shop for your engagement needs. Everything on the Engagement Resource Center can be easily downloaded and shared directly with your teams. We recommend bookmarking this page, and checking it often!

[Access Engagement Resource Center](#)



## Your cheat sheet for success

### Top five best practices for onboarding

1. Dedicate 2+ days of your new employee onboarding to train specifically to Total Expert.
2. Set up as much as you can in advance (profile information, integrations, contacts) and utilize success metrics to sell the value of Total Expert.
3. Map out a success plan for a new end users first 100 days and be sure to include training milestones that should be completed along the way.
4. For each new user, schedule a 30-day check in to review their data (contacts, email metrics, etc.) and suggest additional training as needed.
5. Create playbooks, handouts and training videos for how to best utilize Total Expert that your end users can easily access.

**“An organization’s ability to learn and translate that learning into action rapidly is the **ultimate competitive advantage.**”**

Jack Welch

Former Chairman & CEO, General Electric



## Best Practices Guide

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## Users & Teams

Start by setting up users and teams, so everyone who needs access has it.



### Users:

Those that will utilize the platform within your organization with set permissions and capabilities.



### Teams:

These can be customizable with a manager or lead having access to any user within his/her team.

### How do you manage users and teams?

Teams may be found by clicking into **“Organization Admin”** then **“Users and/or Teams”**.

During implementation, an initial upload of users was performed. If you need to add additional users, there are two ways:

1. Manually add individual users, or
2. Use the data uploader to add larger groups.

For more on users and teams [visit here.](#)



## Permissions

To ensure everyone has the correct access to Total Expert, you must consider permissions.

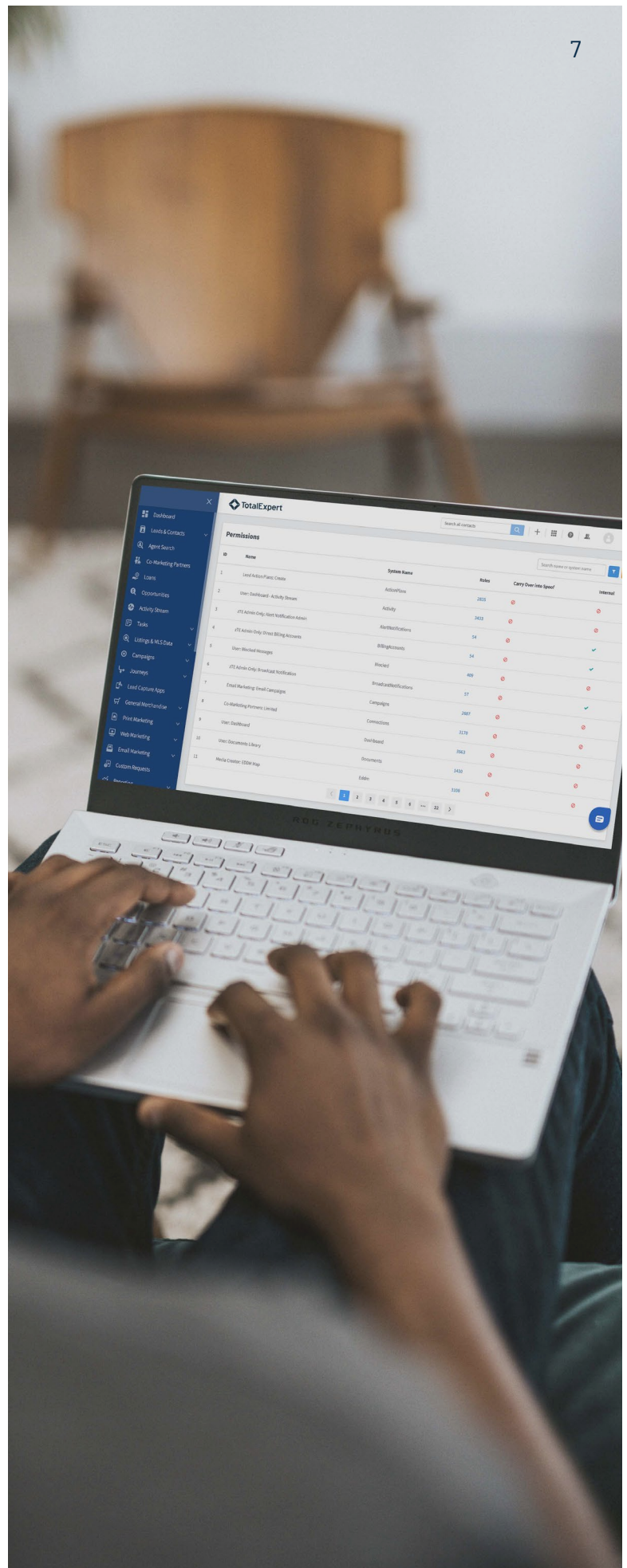
**Permissions within teams allows the following:**

- Manager has access to login in to his/her team members accounts
- Allows for setting up specific content and team marketing items
- Allows for regional and or branch level marketing options
- Top producer logo availability

Permission structure also allows the admin the ability to set feature capabilities, and what view an end user will have when in Total Expert.

**Remember:** always consult with your Customer Success Manager prior to making changes to permissions.

For more on permission guides [visit here.](#)

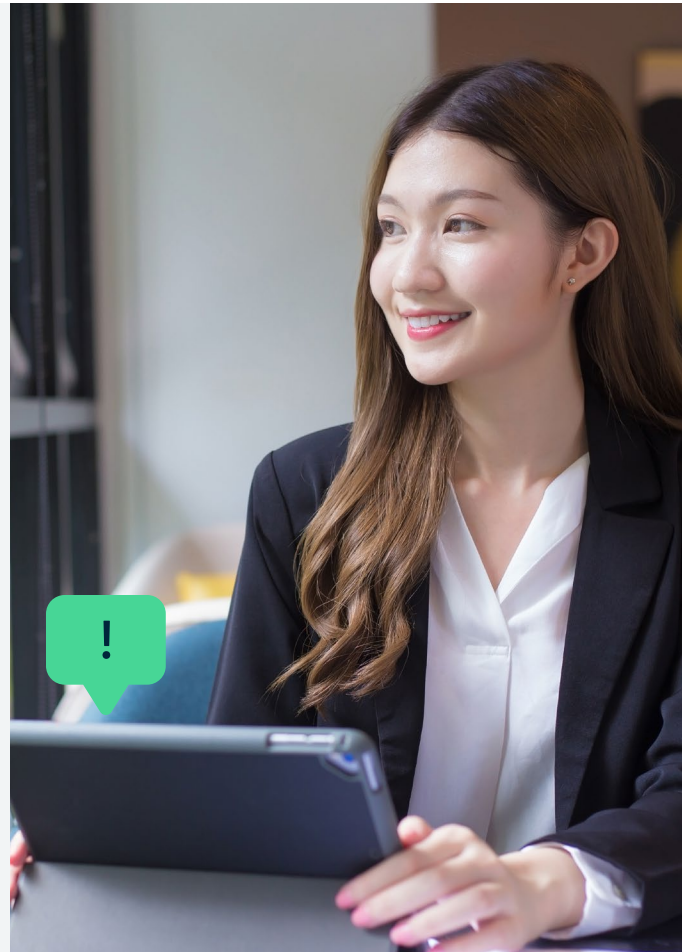




## Company Notifications

If your organization uses a “**user**” seat for company level marketing and or internal communication, it is best to follow the same “best practices” as recommended for your end users.

Get these notifications turned on and make sure all of the company level integrations have successfully been activated. You do not want to miss anything important!



## Groups & Smart Groups

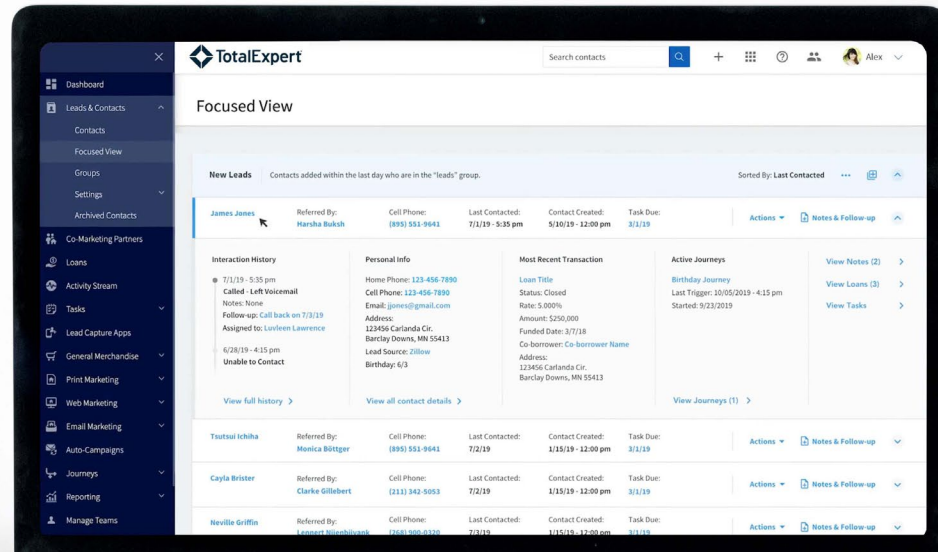
There are a few simple, yet effective, ways your end users can utilize Total Expert to efficiently organize their contacts and make sure the automation is sending the “right message, to the right person, at the right time”.

Groups and smart groups are powerful tools for overall contact management. The use of groups and smart groups help to assign a contact to the correct campaign, and they offer a strategic approach for end users to market to their database. End users also have

the ability to create custom groups that cater to the individual’s business goals.

As an admin the ability to build organizational groups gives your end users a foundation to start with. Creating these groups ensures consistency across your organization by segmenting your audience around things they have in common, ultimately scaling your marketing efforts.

For more on groups and smart groups [visit here.](#)



## Focused View

Within Total Expert, you can create prioritized contact lists for your end users, so they don't have to think twice about their highest-priority touchpoints.

Standard Focused Views automatically generate based on business goals outlined by your team and organization. These standard views are available to all users. Custom views, on the other hand, allow the end user to generate their own contact lists, based on their own criteria.

End users can also log an outcome via Focused View, and add notes or tasks to keep their contact records up to date.

For more on focused view [visit here](#).

## Best Practices

1. Identify contacts that are the highest priority (triggers for certain events such as rate alerts, just listed alerts & more).
2. Understand the customer lifecycle for your organization and build to complement this.
3. Consider what workflows, campaigns, or journeys your organization and end users have enabled.



## What is Expert Content?

It is a purpose-built personalized library for you and your organization to leverage. This library is made up of email templates, social, print, and more.

During implementation you worked alongside the Total Expert team to create your expert library, and now you simply need to make sure your end users have what they need for success.

For more on expert content [visit here.](#)

### Best Practices

1. Ensure all marketing content is available and categorized into folders for your users.
2. Use tags for a more detailed labeling approach for easy to find content.
3. Make sure any preset cost splits are included in co-marketing collateral, when applicable.



## Email Templates & Library

Email is still one of the most effective ways to communicate with contacts. Total Expert has taken the burden of creation and design off of you, and offers pre-designed and pre-built options that you and your team can leverage.

**Remember!** Organizing your library is critical in order to maximize adoption and engagement.

For more on email templates [visit here](#).

### Best Practices:

1. Make sure all users and teams have access to the right email messages and content.
2. Ensure that users have access for one-off email sends.
3. Remember consistency, and an easy to use approval process is essential.
4. Using a strong naming convention is a great way to keep everything clean and easy to find. This can be achieved by using folders and tags.

## Content Templates: Print & Social

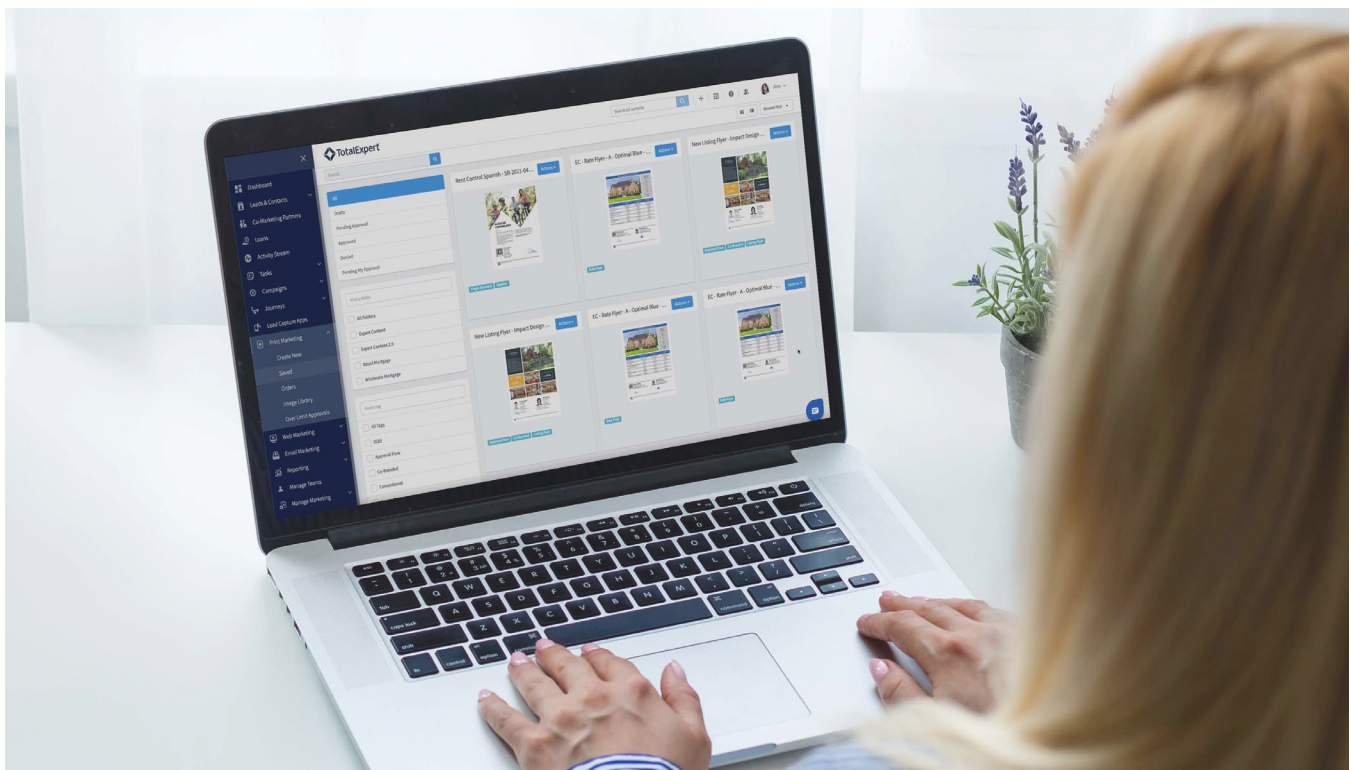
Total Expert's robust library of Expert Content includes print and social media templates for you and your end users to leverage.

Similar to your email library, be sure to leverage tags and folders with an easy to use naming convention to boost adoption and engagement.

For more on content templates [visit here.](#)

### Best Practices:

1. Remind your end users to integrate their business social media accounts.
2. Make sure end users have access to all social and print content.
3. Build a social post calendar for end users to follow. This calendar should be made up of suggested post ideas for an end user to leverage as they get started. Include this calendar as part of the onboarding success plan provided with their Total Expert Onboarding Playbook.



## Campaign & Journey Library

During implementation, you created campaigns and journeys that align with your organization's overall business goals. Now, it's time to share your hard work! Make sure your end users know what is available and automated for them, adopting a "set it and forget it" mindset. For more on campaigns and journeys [visit here](#).



### Campaigns:

Great for birthdays, holidays, newsletters, etc.

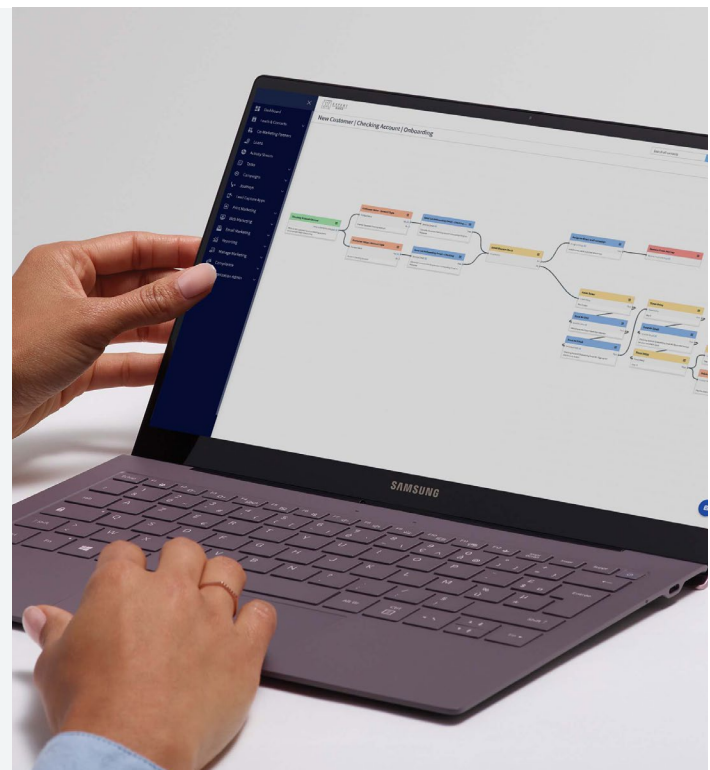


### Journeys:

Using intelligent automation, journeys will flow based on how the contact behaves and responds to each email within the journey, creating a more personalized experience.

### Best Practices

1. Provide a list of all active campaigns and journeys available within your organization – a cheat sheet for your users to see in one place and include it in the onboarding success plan and playbook.
2. For an in-process active loan, it is our best practice to use a journey!



# What's next?

How do you keep the momentum and continue pushing your end users for maximum adoption? Explore our best practices for ongoing promotion & overall engagement.

## Top five best practices for ongoing promotion

1. Create an intranet page dedicated to Total Expert and other technology partners with links to help resources, training videos, and new creative materials.
2. Host a weekly, 15-minute webinar dedicated to one topic that is co-led by marketing and end users. Include activities and participation incentives!
3. Include a standing agenda item to your monthly all-hands meetings to give a quick, 5-minute update on Total Expert. Consider giving updates on new content and features, upcoming trainings, and engagement resources.
4. Focus on executive buy-in and reinforce the importance of encouraging end users to leverage Total Expert from a leadership perspective.
5. Showcase quotes and data from top producers - success champions are your biggest asset!

## Top five best practices for overall engagement

1. Adapt an all-in, all-on mindset by making Total Expert the preferred technology partner for your end users.
2. Ask your top producers and champions for feedback on custom solutions, then adapt into a one-to-many template.
3. Host Total Expert Bootcamps at least once per quarter to easily train new end users and re-engage seasoned users. The short tutorials and challenges, along with a little competition, will keep everyone engaged.
4. Each time Total Expert releases an engagement resource, set aside a minimum of 1 hour to sift through the materials and decide an action plan for your organization. This could mean using the resource as-is or using it as a template to create your own.
5. Always attend the engagement showcase webinars to hear how resources are best utilized and tips and tricks for adoption!



## Additional resources available to you

Engagement and adoption are ongoing initiatives for any organization, and Total Expert wants to provide the same ongoing support throughout your experience.



### Expert Engagement Consultation

A consultative approach to strategize with customers and develop success plans for more increased engagement & adoption of Total Expert. This includes a comprehensive assessment of your overall adoption and a prescriptive strategy which may include a Total Expert Week, Bootcamp, or other experience.

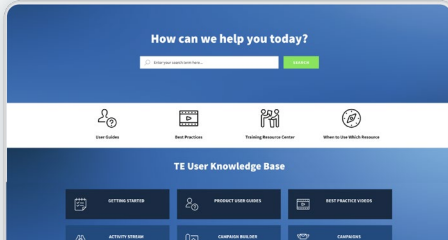


### Marketing Masterminds

Total Expert takes pride in the partnerships we have with our customers, and we value their opinions and first-hand experience with using Total Expert. Hosted by the Engagement and Experience team, we showcase top Total Expert marketers allowing our special guests the opportunity to share their success stories and secret sauce with the entire Total Expert family. Be sure to keep an eye out for our next Marketing Masterminds session, and register ahead of time.



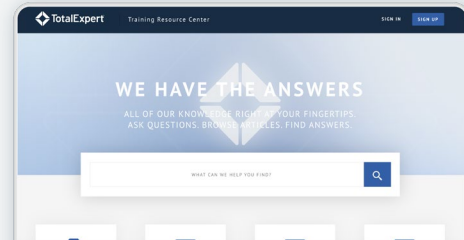
## Don't forget about our other help resources!



### Help Desk

Point your end users here for any support and product related questions.

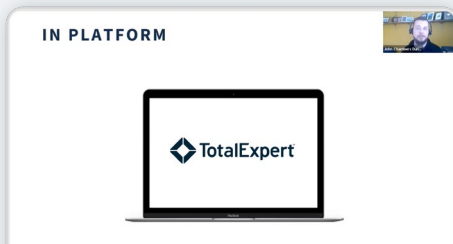
[Visit >](#)



### Training Resource Center

Utilize our extensive library of training videos and articles.

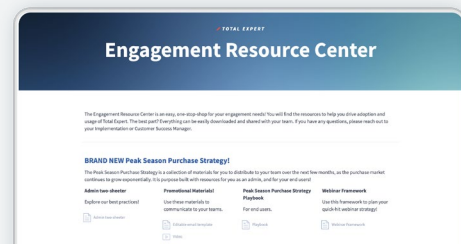
[Visit >](#)



### Open Enrollment Training Sessions

Encourage your end users to attend the monthly training sessions led by our Total Expert Training Consultants. Make sure to read our monthly training newsletter for more information and to access your end user toolkit.

[Visit >](#)



### Engagement Resource Center

Browse our library of pre-built engagement resources that will help drive end user adoption and usage of Total Expert.

[Visit >](#)



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.

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