



Top 10 Mortgage Best Practices

Go all-in and all-on with Journey automation

Drive consistent and personalized experiences.

Scale business workflows

Build Journeys that automate direct user engagement and create Focused Views to surface high-value call lists.

Increase value with a connected tech ecosystem

Leverage available integrations to automate consistent outreach.

Elevate sales team while scaling support staff

Remember the Hub & Spoke model – empower, optimize, scale.

Centralize marketing content to improve the user experience

Leverage available integrations to automate consistent outreach.

Introduce a consistent, automated process for onboarding and engagement

Leverage available integrations to automate consistent outreach.

Get more from customer-facing teams without asking them to do more

Enroll end users in the Daily Digest.

Use data-driven alerts to trigger automated engagement

Engage Listing Notification Alerts.

Reinforce value with recurring training and updates

Send a monthly email with Total Expert updates, including new content, available Journeys, training opportunities, and highlighted features.

Extend marketing staff with Total Expert support

Educate your end users on their direct support access and resources: available six days a week!