

Deliver the Perfect Customer Journey

Find more opportunities, engage more customers, and close more loans with Total Expert

To consistently build pipeline and hit your revenue goals, you need purpose-built digital tools that help you engage borrowers and homeowners at the moments that matter. Total Expert combines email, SMS, print, direct mail, phone calls, and social media to deliver a truly personalized customer experience no matter when or where they choose to engage.



The power of purpose-built

Total Expert is a single, integrated platform that consolidates your data, enriches customer profiles with the latest insights, and surfaces every opportunity for you to engage contacts with personalized communications.



Customer Intelligence + Life Event insights

Enrich your contact profiles with the latest data around major life milestones like getting married or becoming a parent so you can engage them in more meaningful conversations about their mortgage needs.

And know the moment a contact is ready to make their next mortgage-related move with dedicated alerts for credit inquiries, equity thresholds, rate qualifications, and property listings.



Sales productivity

Tap into a seamless CRM and customer engagement platform that helps you prioritize opportunities, automate customers communication, increase efficiency, and ultimately drive better outcomes for your customers.



Marketing automation

Engage your customers and prospects with customized, multichannel campaigns and personalized Journeys that combine digital and human touchpoints. Make every interaction impactful and stop letting customers slip through the cracks.



Content library

Tap into a fully customizable print marketing library. From emails and social media posts to print collateral and direct mail, you'll have immediate access to content that's created by industry experts and proven to drive more impact and fuel meaningful conversations.



Co-marketing tools

Expand your professional network by leveraging our co-marketing tools—lead capture apps, single property websites, print marketing, social media, and more—to build agent relationships and support their listings.

The data doesn't lie

• **2x+**

retention rate

Loan retention rates climb to over 60%—more than triple the 18% industry standard.

• **20%**

year-one revenue increase

Loan production increases 20% per loan officer in the first year—and more than 40% by year three.

• **20%**

productivity increase

Identify high-quality opportunities faster so you can spend more time connecting with borrowers and homeowners.

“



Total Expert has streamlined our process to where everyone gets the exact same experience, and all of our fine details are tracked in Total Expert. It keeps me organized and lowers my stress levels because I can see what my weeks look like and move things around to manage my own schedule. I recommend everyone jump in and get started. You'll wonder why you didn't use Total Expert sooner.”

Heather Neuner, Sr. Loan Officer



Learn more about our award-winning mortgage CRM at TotalExpert.com