

Be There When Your Customers Need You Most

Identify customer life events to offer tailored financial guidance, resources, and solutions, helping them make informed financial decisions.



Total Expert Customer Intelligence delivers the timely, actionable insights your teams need to engage customers with personalized communications at every financial milestone. With a customer profile enhanced by Customer Intelligence, you'll be able to deliver personalized, authentic communications and provide the best products or services to support your customers' short-term needs and long-term goals.

Turn data into deeper relationships

Getting to know your customers doesn't require seeing them face-to-face all the time. Your data can tell you almost everything you need to know. With insights delivered by Total Expert, you can reach out to them when they need you most. Our solution combines a system of intelligence with a system of action—allowing you to easily segment and educate customers with personalized messages, resources, and offers whenever an opportunity presents itself. Now, you'll know the moment a customer experiences a major life event like:

- Getting married
- Having a baby
- Celebrating graduation
- And more

Personalization, at scale

- Life Events: An insight is delivered to you the moment a customer's circumstances change.
- We also capture that moment by adding it as a data point in their comprehensive customer profile.



Organizations will receive insights for about 5% of their monitored consumer database on a monthly basis.

Learn how you can create more opportunities to engage with your customers at totalexpert.com/customer-intelligence