



# Five Pillars to Admin Success in Total Expert *(with A Marketing Agency)*

## Communicate with your sales team

All Total Expert administrators should work to create an active line of communication with their sales team so that if/when a roadblock surfaces, your sales leaders can step in to provide direction. A few ways to do this could be:

- **Creating an end-user advisory board:** Create a small group of end users within your organization centered around the use and application of Total Expert. This group of individuals will get you direct feedback from the field and make sure you are aligned with the priorities of the sales team. It will also encourage visibility and transparency across the board within your organization.
- **Recurring branch manager meetings:** Branch managers tend to have a great deal of influence over their salespeople. It is extremely important to make sure your branch managers are bought in and understand the value of the platform so that they can encourage their teams to leverage the system.
- **Meeting regularly with sales leaders:** It is important to create regular weekly/bi-weekly/monthly meetings with your organization's leadership to make sure everyone is up to date on the system and its capabilities. It also is a great time to address any lingering issues you might be facing and review expansion opportunities.

## Champion your own success

As a Total Expert administrator, you should always be your biggest champion. Some of the ways that you can make sure you have the best success in Total Expert are:

- Doing an audit with your Customer Success Manager on permissions and functionality.
- Asking the question: Is there anything we are not doing right now that we can be doing to maximize efficiency?
  - Put together a plan with your Customer Success Manager to audit sections of the platform.
  - Work down the left-hand navigation bar feature by feature.
  - Troubleshoot your own questions.

## Capitalize on your resources

There is an abundance of resources on the Total Expert knowledge base that can help you if you get stuck. Take advantage of all the knowledge that you have right at your fingertips. There are guides, videos, simulations, training courses, admin tools, and an engagement center that you and your end users can leverage.

## Create quality over quantity

More is not always better. Having a smaller amount of high-quality marketing materials is more powerful than having an abundance of outdated, irrelevant content. When looking to create forward-facing marketing materials consider these tactics:



- **Audit your print marketing library:** Take time to go through your print marketing library. Keep highly leveraged content, get rid of any outdated content, and take note of which assets need to be updated.
- **Tailor your content to your end user:** It is important to talk to your organization, both leadership and the end users, to see what type of content they are looking to use. Make sure that your print marketing library reflects the content that people are actively using or seeking out.
- **Less is more if it is quality:** All your content should be purpose-driven. Establish your organization and your end users as thought leaders through informative and engaging content. The mortgage process can be very overwhelming for borrowers, so forward-facing educational content can help alleviate fears. It is all about producing functional, quality content across the board for your organization to use.

## Consistently educate and optimize

Total Expert is always innovating and evolving, and it is important that your organization is too. To make Total Expert scalable, it is important to talk to your leaders about their long-term marketing plans. Understanding their goals allows you to make your organization's Total Expert instance unique even as you grow. As you continue to grow, it is important to focus on the following:

- Educating and enabling your end users on what you have and new additions to the product
- Continually reiterating who they should go to for help and when

*If you would like to get in contact with A Marketing Agency, please reach out to Pierson Hibbs (pierson@amarketing.agency) and/or Liz Hall (liz@amarketing.agency).*