



How to Build a Loan Officer Advisory Board

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Purpose of the Loan Officer Advisory Board

Establishing a Loan Officer (LO) Advisory Board—or Steering Committee—creates a consistent, collaborative feedback loop between sales and those managing the Total Expert platform. The board should act as a bridge between end users and platform administrators to improve engagement, elevate the voice of loan officers, and ensure alignment across the organization.

Core Objectives:

- **Promote a Positive Culture** – Amplify what is working well and constructively address challenges or negativity within the sales team.
- **Understand Sales Team Needs** – Surface real-time feedback, identify pain points, and uncover adoption roadblocks from the field.
- **Empower Originators** – Foster a sense of ownership and agency among loan officers regarding how Total Expert is used.
- **Improve Communication Channels** – Establish a direct and ongoing line of communication from the field to administrators and platform stakeholders.
- **Increase Transparency** – Share insights into how Total Expert is evolving, reinforcing that LO input informs decisions.

Meeting Cadence and Structure

Consistency and intentionality are key to maintaining momentum and value.



Meeting Frequency

- **Recommended Cadence** – Monthly or quarterly, based on customer size and engagement level.
- **Best Practice** – Meet bi-monthly or quarterly—do not meet more than once a month.
- **Tips**
 - Lock in dates early and communicate them in advance.
 - Track attendance and engagement over time.
 - Use recurring calendar invites and reminders to drive participation.

Meeting Content and Agenda Framework

These sessions should be co-owned by your Customer Success Manager (CSM), administrator(s), and sales leadership to ensure diverse input and alignment.

Sample Agenda Topics

- **Corporate/Marketing Initiatives** – Share updates on organizational/marketing roadmap of priorities.
 - Consider leveraging a project management system (such as Smartsheet or Excel) to track quarterly initiatives and show progress to originators. On each call, review progress of initiatives and collect feedback:
 - Share any completed items and quick wins.
 - Review WIP and upcoming items.
 - Re-evaluate priority level of upcoming items with originators, as items may shift with market conditions.
 - Collect new ideas and feedback.
- **Total Expert Updates** – Discuss any new features or enhancements to the Total Expert platform.
- **NPS or Survey Results** – Review recent satisfaction data from LOs and collaborate on improvements.
- **Support Insights** – Highlight recurring support ticket trends or FAQs and use them as coaching or platform training opportunities.
- **Sales Success Stories & Wins** – Discuss how LOs are using Total Expert on sales calls and spotlight any success stories or recent wins.

Selecting the Right LOs for the Board

Diversity of perspective is essential to building a board that is both respected and impactful.

Who to Include

- **Size** – Aim for 10–15 members. Expect some variability in attendance.
- **Types of Participants**
 - Top promoters and vocal detractors (balance perspectives)
 - High, mid, and lower producers (diversity in adoption and engagement)
 - Range of tenure (newer vs. seasoned LOs)
 - Variety of roles (individual LOs, team leads, branch managers, and regional marketers)
- **Selection Tips**
 - Use platform usage and data to identify candidates.
 - Consider inviting LOs who have submitted meaningful platform feedback in the past.
 - Rotate members periodically to expand involvement and fresh perspectives.



Closing Thoughts

An LO Advisory Board is not just a feedback mechanism—it is a strategic engagement lever. By thoughtfully selecting members, designing purposeful agendas, and consistently acting on feedback, you will foster trust, grow adoption, and make Total Expert a more integral part of your loan officers' daily workflows.