



6 Total Expert Habits of Effective Mortgage Loan Officers

1. Connect with multiple co-marketing partners for more business.

- a. More co-marketing partners means more business opportunities!
- b. Host events for your partners to drive adoption, excitement, and engagement with the Total Expert system.
- c. Cast a wide net with a lot of partners, then hone in on the relationships that are bringing in business.

2. Use listing insights to be successful in a purchase market by surfacing contacts who have listed their home.

- a. Use the Listing Insights view in Focused View.
- b. Opt in to a Listing Insight journey, if available.
- c. Congratulate the listing agent via social media, email, or text. If you're not currently co-marketing with them, try to make a connection!

3. Invest time and effort to learn and master Total Expert.

- a. Attend training each month! See details at totalexpert.com/training.
- b. Check out our [Training Resource Center](#) in the platform for guides, simulations, webinar recordings, and more!
- c. Mastering Total Expert will enable you to confidently speak to and sell the value of co-marketing with Total Expert.

4. Use Focused View every day as a call list to reach out to high-touch customers.

- a. Use the standard views, which are created and published by your marketing administrators, to find contacts which may surface for a specific business initiative, driven by your organization.
- b. Create your own custom views, specific to your business, by copying standard views and personalizing them or by starting from a blank view to build your own from scratch.

5. Leverage the power of loan statuses in smart groups and journeys.

- a. Create smart groups using loan statuses to easily keep in touch with customers throughout each stage of the pipeline.
- b. Ensure you are opted in to in-process campaigns to keep your borrowers and other plan participants, such as your agent partners, informed in real time through the loan process.

6. Build and reinforce relationships using Total Expert to create customers for life.

- a. Campaigns in Total Expert are powered by intelligent automation, so be sure to opt in to all available journeys to turn leads into customers—and customers into customers for life!
- b. Communicate to your contacts where they are most likely to see it! Send the same messaging via multiple channels like direct mail, social media, SMS, and email to build your brand and keep your name in front of clients.