End User Onboarding Playbook

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# What is Total Expert?

Total Expert is a purpose-built CRM and customer engagement platform designed to create growth and loyalty for modern lenders and financial institutions. Total Expert is your single source of truth with industry-leading integrations to your LOS, POS, PPE, MLS, third party lead sources, social media, and more!

The platform offers a 360-degree view of your customers and database and personalizes at scale with data-informed marketing automation and hyper-personalized journeys. Total Expert gives you speed to market — allowing you to concentrate on building relationships and doing what you do best.

* All In – One Stop Platform
* Contact Management
* Intelligent Automation – Capturing Customer Information
* Social Media Library
* Print & Direct Mail Capabilities
* Co-Marketing Partners
* Single Property Sites & MLS Listing Insights
* Compliance Ready
* Email Campaigns & Journeys
* One-Off Emails
* SMS Capabilities
* Post Close – Customer for Life Campaigns

# Getting Started

Step one is getting signed in. Use this link to sign into Total Expert.

Helpful Tips for Signing In:

* Make sure you’re using Google Chrome
* Add Tip 2
* Add Tip 3

## Check Out Your Dashboard

The dashboard provides a snapshot of opportunities and everything happening within your Total Expert account. The tiles will take you directly to each category shown below:

* Contacts
* Tasks
* Pipeline
* Emails
* Co-Marketing
* Birthdays

## Review Your Account Profile

Time to verify your account details:

1. Click the drop-down menu by your name and select account settings.
2. Check that all your personal information is correct and let your marketing team know if any changes need to be made.
3. Ensure that you have a profile photo as this will be used for marketing collateral.

## Turn On Those Notifications!

We don’t want you to miss out on any valuable information from your database that might result in more business! Be sure your notifications are turned on by navigating to Account Settings > Notification Settings. It is our best practice to turn on all notifications to start, then scale back as needed.

**Tip:**

Don’t forget about the **Daily Digest.** The Daily Digest is an email sent from Total Expert directly to your inbox, every day. It outlines what emails are scheduled to be sent, appointments you have, tasks to be completed, birthdays, loan anniversaries, and much more!

## Integration Settings

Total Expert offers industry-leading technology integrations that result in a single source of truth. With a long list of technology partners, you can seamlessly share data between the Total Expert platform and your other preferred systems to engage with customers and create lifelong financial relationships.

You can currently integrate with:

(Insert available integrations in bullet point format. For example: )

* Facebook
* LinkedIn
* BombBomb

## Review Your Leads and Contacts

Your contacts have been preloaded into Total Expert. Take a moment to review your leads and contacts, ensuring the data import was successful.

* Start by navigating in-platform to Leads & Contacts > Contacts.
* After you’ve reviewed your available contacts, head to Leads & Contacts > Lead Management > Leads.
* If you find any errors while reviewing your database, reach out to your marketing department.

**Exercise:** Let’s create a “test” contact now!

As you get started using Total Expert it is our best practice to add yourself as a test contact, so you can view and send practice emails with the peace of mind that you won’t accidentally send an email to the wrong person. Use a personal email, a personal phone number, and give your contact an easy to remember name (i.e. “TE Test Borrower”).

Use this [**help resource**](https://totalexpert.freshdesk.com/support/solutions/articles/22000280408-create-a-new-contact-simulation) if you run into any trouble!

## Groups and Smart Groups

Once you have your whole database imported with all the right contacts, it’s time to segment your audience into groups. This way, you can personalize and automate at scale – sending the right message, to the right person, at the right time.

To help you get started, we’ve created organizational groups that you can leverage. Additionally, you can create custom groups that cater to your individual business goals. To learn more about groups, [**click here**](https://totalexpert.freshdesk.com/support/solutions/articles/22000250553-how-to-add-individual-contacts-to-groups)**!**

## Focused View

Once you’re ready to start mining your database for opportunities, you’ll want to explore Focused View. Focused View automatically creates prioritized contact lists, so you don’t have to think twice about your highest-priority touchpoints.

We’ve created standard views based on specific business goals outlined by our organization. Custom views, on the other hand, allow you to generate your own lists based on your own criteria.

Our current standard Focused Views are:

* Insert standard FV
* Insert standard FV
* Insert standard FV

## Explore All The Available Content!

Within Total Expert, we have a complete library of pre-built content for you to utilize. Be sure to check out all that is available to you! There are emails, social media graphics, flyers, print materials, and more.

**Excerise:** Put your knowledge to the test!

Get ready to market with ease. Try scheduling a social media post by going into Web Marketing > Social Media > Create New.

Need more instructions? Try this [help resource.](https://totalexpert.freshdesk.com/support/solutions/articles/22000262036-how-to-share-standard-social-media-content)

## Journeys and Campaigns

Journeys are all about “Intelligent automation” - unlike the old-fashioned drip campaigns that drip on a prospects head x number of times and then stops, Journeys are intelligent and will drive the next best action based on what the recipient does (or doesn’t) do.

Journeys aren’t limited to email communications. You can also connect with your customers via text message and video. Tasks can also be added to alert you when it’s time to take action.

Take a moment to review the journeys we have created on your behalf in Total Expert:

* (insert company link and or list of available journeys)

## Level-Up Your Co-Marketing Relationships

Total Expert provides complimentary software for your real estate agent partners and builders. Together, you can create amazing customer experiences and build your brands in one, centralized location.

Co-marketing partners have FREE access to print marketing materials, open house automation, referral generation, property websites, lead and contact management, lead activity tracking, and Total Expert support. Split print costs are automatically included, making it easy to stay compliant.

Click [**here**](https://totalexpert.freshdesk.com/support/solutions/articles/22000280192-connecting-with-a-co-marketing-partner) to learn how to invite a Co-Marketing Partner.

**Exercise:** Let’s practice adding a test co-marketing partner.

Add yourself as a Co-Marketing Partner in Total Expert using your personal email address. Once connected, practice using the powerful tools available within Total Expert.

## Single Property Sites

Single Property Sites are one way to attract and engage homebuyers! These easy to create, beautiful websites automatically generate information based on the MLS listing, and capture lead information with embedded forms. Single Property Sites can be single-branded, or better yet – co-branded with your agent partners!

Click [**here**](https://totalexpert.freshdesk.com/support/solutions/articles/22000280104-single-property-website-quick-hit-video)to give it a try and learn how easy this process really is -5 clicks and you are done!

**Exercise:** Create a Single Property Website

Determine a co-marketing partner you’d like to do business with. Find one of their listings, and copy/paste the MLS # to create a Single Property Site. Send the Single Property Site URL to the agent, let them know you created it, and how easy it was!

## Lead Capture Apps

Lead Capture Apps serve as a lead generation tool for open houses or professional events. The information you capture in a Lead Capture App automatically pulls into your Total Expert account, making follow up a breeze.

There are multiple template to choose from, and you won’t believe how easy they are to create. Click [**here**](https://totalexpert.freshdesk.com/support/solutions/articles/22000280071-lead-capture-app-quick-hit-video)to learn how to create your first Lead Capture App!

# Next Steps

1. The Total Expert Knowledge Base is a one-stop-shop to get all your Total Expert questions answered. You can access the Knowledge Base by either clicking the blue chat widget at the bottom right-hand corner of the platform or clicking the Help Desk in the gray question mark at the top right-hand corner of the platform.
2. We have live agents available to support you. If you need to talk to an agent, you can click the blue chat widget at the bottom right-hand corner of the platform.
3. Insert you marketing team contact information here.