

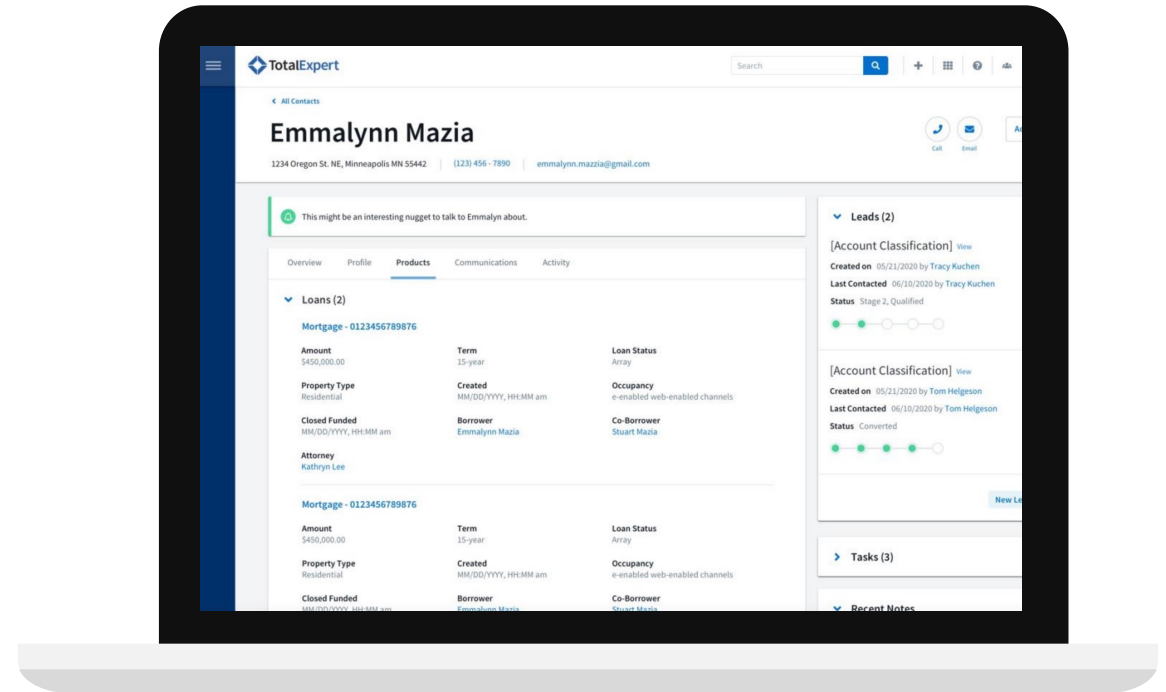
2023 Spring Release



Transform your tech stack into a deal flow engine

Deepen your customer relationships with a dynamic, data-rich customer profile.

- Capitalizing on data-driven deal flow.
- Streamlined workflows, heightening productivity.
- A better customer experience with centralized data through connected integrations.



KEY DATES

KNOWLEDGE BASE
RELEASES PAGE UPDATE
MAY 15

GA
RELEASE
MAY. 17



'23 Spring Release:

KEY DATES

NEW RELEASES PAGE
MAY 15

GA RELEASE
MAY 17

IMPROVE LEAD QUALITY, VOLUME, AND ROUTING

- TE for Salesforce (*Integration*)
- SMS Platform Notifications (Lead MGMT Required)*
- Lead to TE User Voicemail (Lead MGMT Required)*
- Zillow (*Integration – Lead MGMT Required*)*
- Milestones (*Integration*)

DATA-DRIVEN MARKETING AND SALES STRATEGIES

- Reporting & Analytics (*Controlled Availability*)*

DATA INSIGHTS AND INTELLIGENCE

- Customer Intelligence: Rate Alert

IMPROVE SALES PRODUCTIVITY

- Encompass (*Integration*)
- Instagram (*Integration*)
- Lender Price (*Integration*)
- Capacity (*Integration*)
- Platform Enhancements
- Recruiting View on Contact Details
- CI Insight History on Contact Details

*Some features and integrations may require specific permissions, add-on modules or upgraded packages.

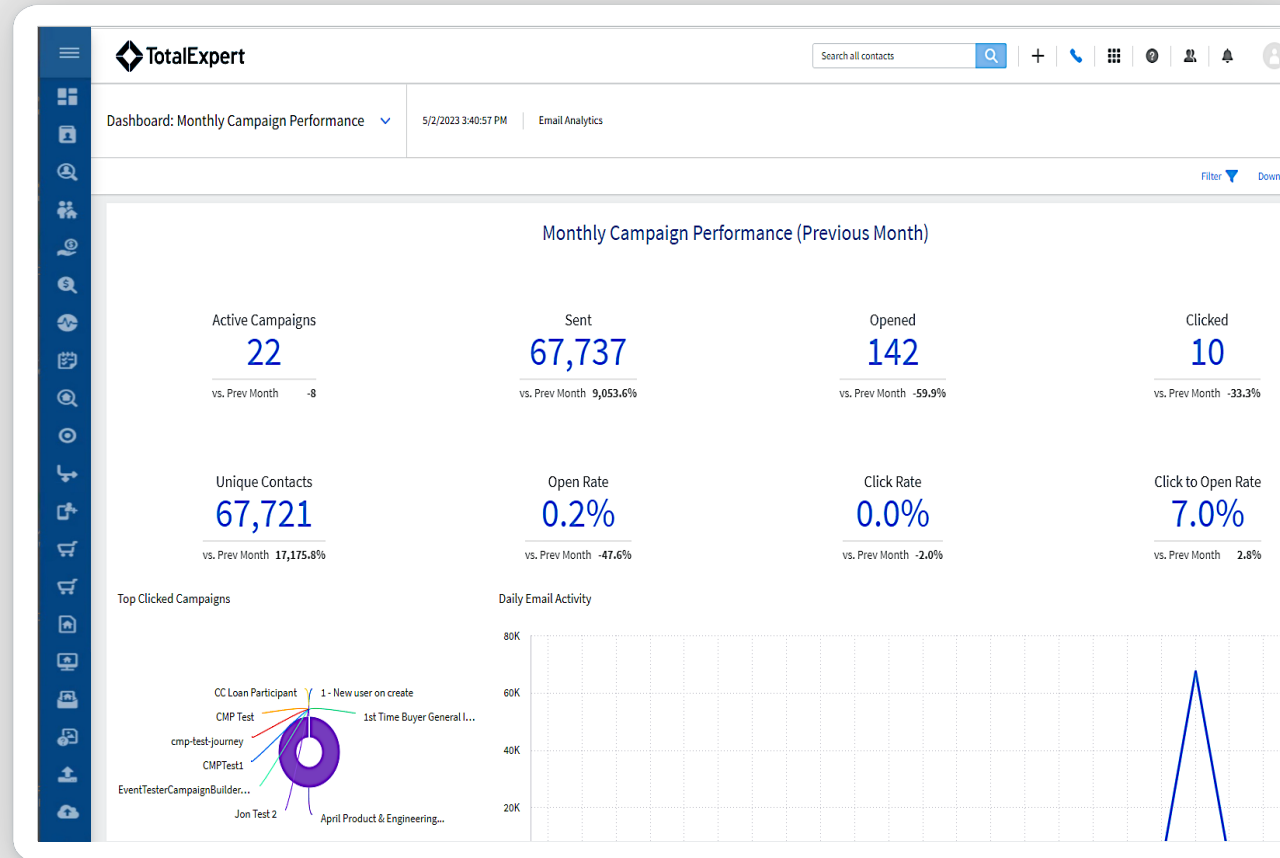
Featured Solutions



DATA-DRIVEN MARKETING AND SALES STRATEGIES

Reporting & Analytics

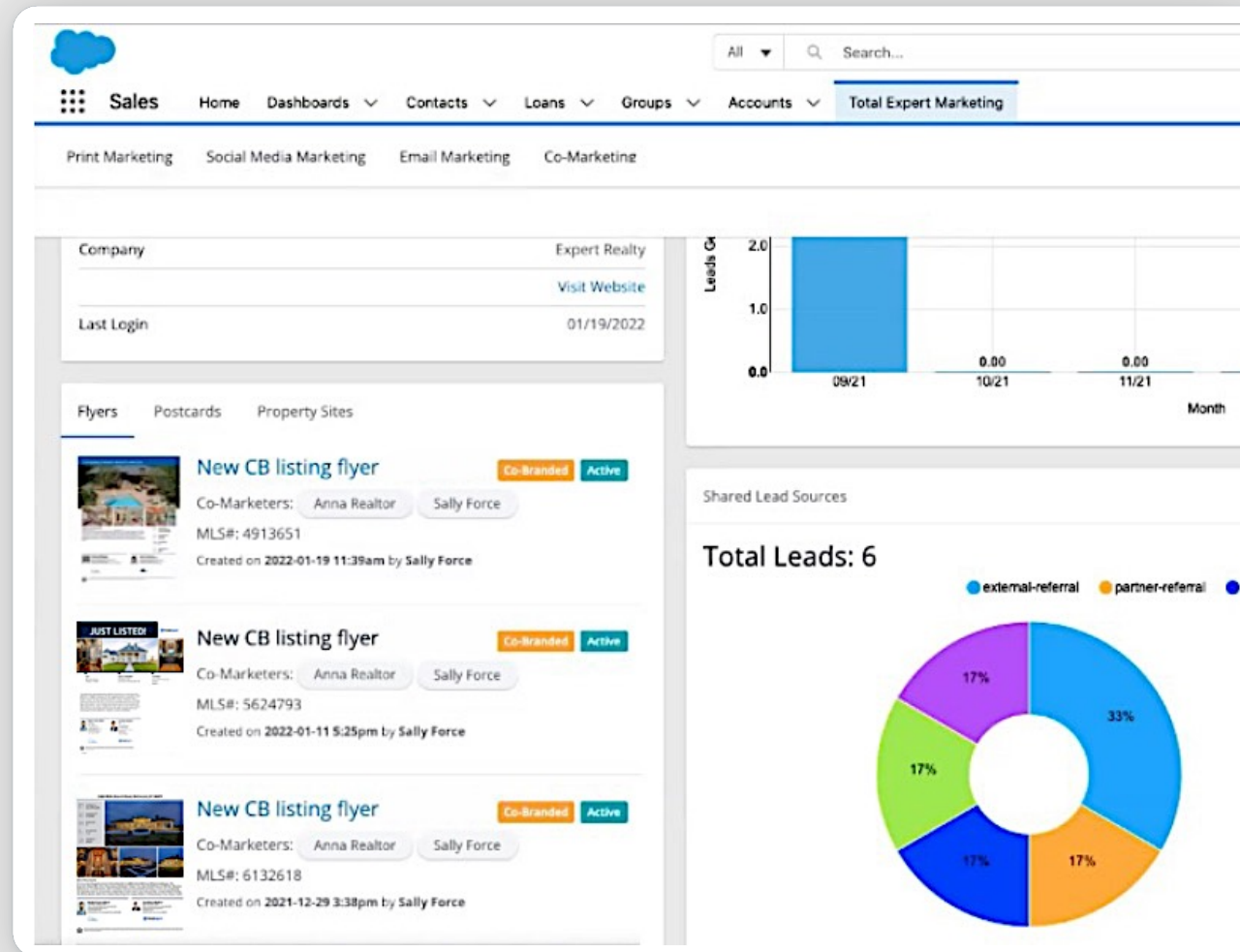
Visualize the impact of marketing and sales activities to determine future strategies. Gain access to detailed, organization-specific dashboards to help you measure **campaign performance** and **loan production**.



INTEGRATION

Total Expert for Salesforce

Add the power of Total Expert's purpose-built sales and marketing toolbox to Salesforce to unlock unmatched value for your institution.



DATA INSIGHTS AND INTELLIGENCE

Customer Intelligence: Rate Alert

Uncover refinance opportunities within your existing customer base. Control which contacts you should monitor, compare the borrower's current rate versus the market, and set thresholds to determine fit.

The screenshot displays the 'Customer Intelligence' section of the TotalExpert application. It features a sidebar with various navigation icons and a main content area with the following sections:

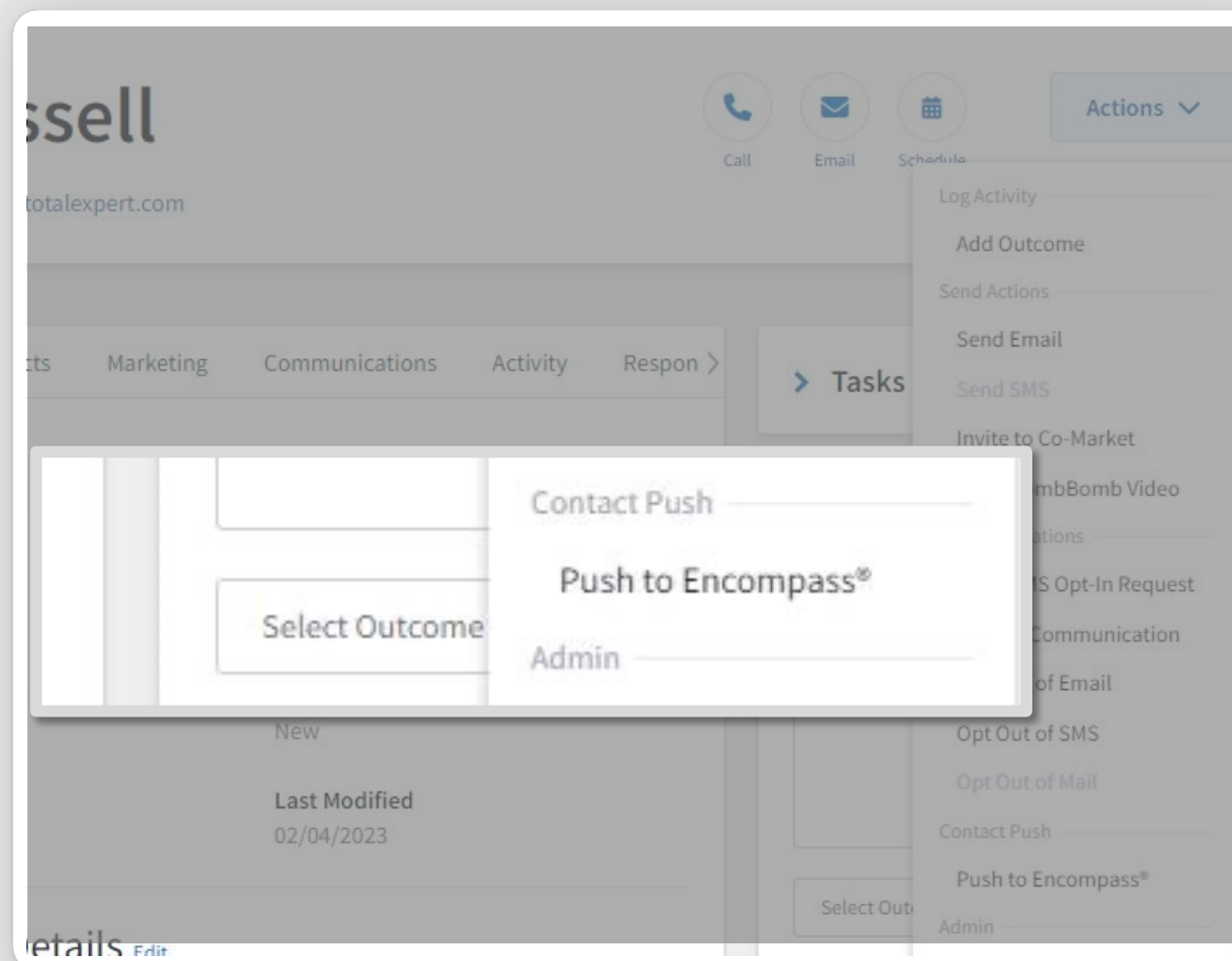
- Contacts to Monitor:** Includes radio buttons for 'All Contacts' (selected) and 'Subset of Contacts'.
- Contacts Watched for Rate:** Shows '11,433 of 11,433'.
- Comparison Rate Source:** Includes a description and a link to 'Mortgage Market Rate Indices'. It has radio buttons for 'Mortgage Market Rate Indices' (selected) and 'Custom Rates'.
- Rate Benefit Threshold:** Includes a description and a 'Minimum Rate Benefit Percentage' input field set to '1'.
- Timing:** Includes a description and two input fields: 'Days Between Alerts' set to '90' and 'Months After Loan Closure' set to '6'.

At the bottom right, there is a 'Save' button.

IMPROVE SALES PRODUCTIVITY

Encompass Integration

Take advantage of this no-code, self-service solution to manage your data needs. Sync contact data and receive real-time updates from Encompass to trigger purpose-built workflows and marketing automation seamlessly.



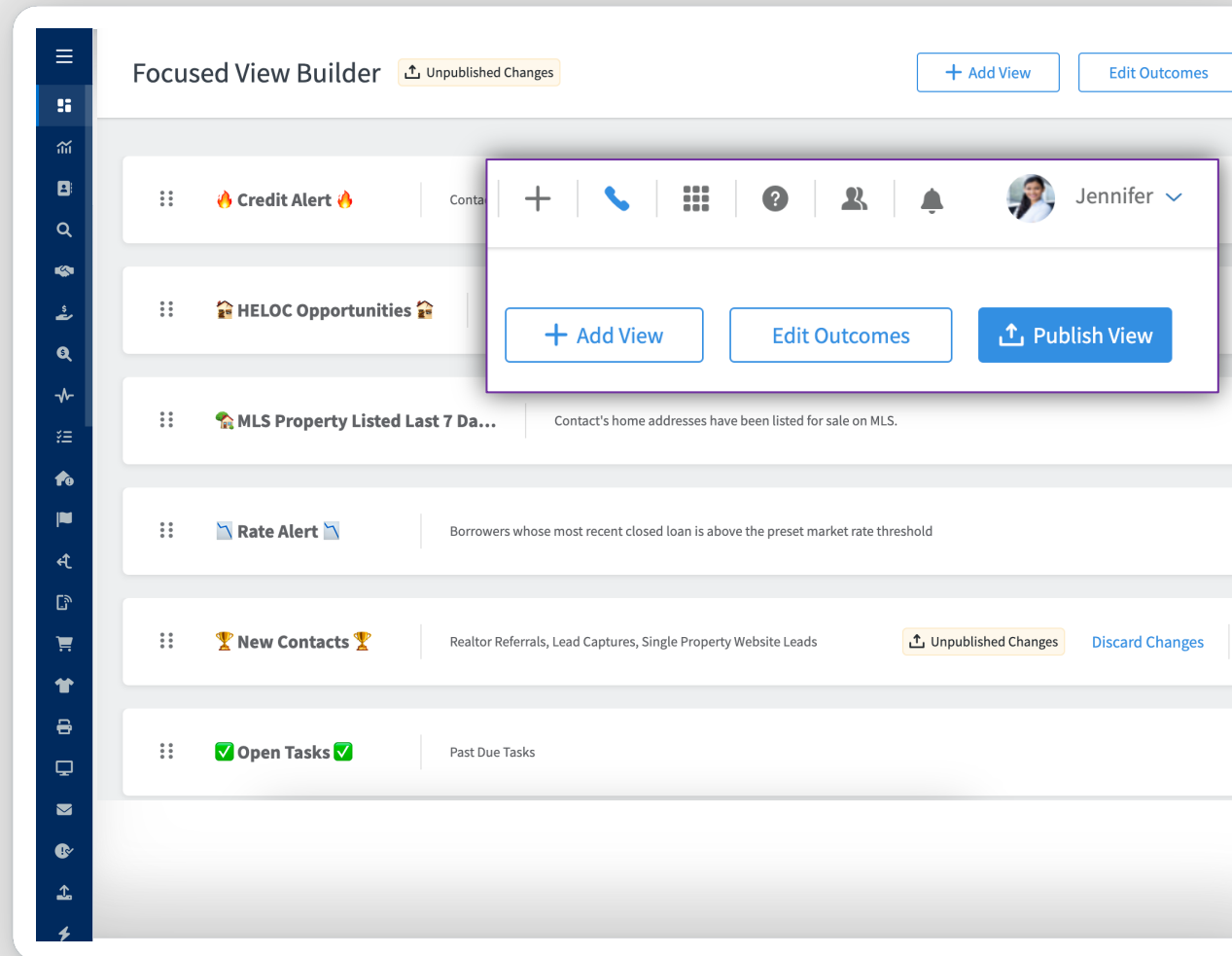
Platform Enhancements



IMPROVE SALES PRODUCTIVITY

Platform Optimizations

To boost sales productivity for users, we improved the navigation between individual records and saved contact lists, enabled editing outcomes on Focused Views, and added created dates to Insights so you can easily determine recency and relevance.



IMPROVE SALES PRODUCTIVITY

Recruiting View on Contact Details

Maximize your recruiting efforts. Put your captured recruiting data to work through automated journeys and access detailed reporting and analytics to pursue the right candidates for your business.

The screenshot displays the TotalExpert CRM interface for a contact named Chad Jameson. The left sidebar contains a navigation menu with options like Dashboard, Leads & Contacts, Agent Search, Co-Marketing Partners, Loans, Opportunities, Activity Stream, Tasks, Listings & MLS Data, Campaigns, Journeys, Lead Capture Apps, General Merchandise, Print Marketing, Web Marketing, Email Marketing, Custom Requests, Import Data, Outbound Data Connector, Customer Intelligence, Reporting & Analytics, Manage Teams, Manage Marketing, Compliance, and Organization Admin.

The main content area is titled 'Chad Jameson' and includes a 'Recruiting View' tab. The view is divided into several sections:

- Profile Details:** Includes fields for Full Name (Chad Jameson), Email Address (chad.jameson@fivemortgage.com), Cell Phone Number (952-675-0989), Lead Status (New), Created On (04/27/2023), Last Modified (05/01/2023), and Last Contacted (04/27/2023).
- Professional Details:** Includes fields for Employer (Five Mortgage), Employer Address (Birmingham, AL), Website URL (http://www.fivemortgage.com/chadjameson), Recruiting Status (Engaged), NMLS ID (34567824), Completed UST (No), Years Experience (10), and Has Resume (No).
- Relationships:** Shows the Owner as Alec Catruros.
- Communication Preferences:** Includes Email (Able to contact), SMS (Not Enrolled), and Postal Mail (N/A).
- Groups:** Shows Smart Groups: Test Group and Transferred Contacts.
- Spouse/Partner Details:** Empty section.
- Sales Production Figures:** Includes Volume (12 mo ending: 04/20/2023, 40000000.00) and Units (12 mo ending: 04/20/2023, 105.00). It also features two donut charts: 'Source of Business Mix' (5% Lead Sources, 5% Leads, 90% Other) and 'Product Mix' (60% Conforming, 15% FHA/VA, 25% Other).

On the right side, there is a 'Tasks (0)' section and a 'Recent Notes' section with a text input field and a '+ Add Note' button. A 'View all' link is also present.

IMPROVE SALES PRODUCTIVITY

Insight History on Contact Details

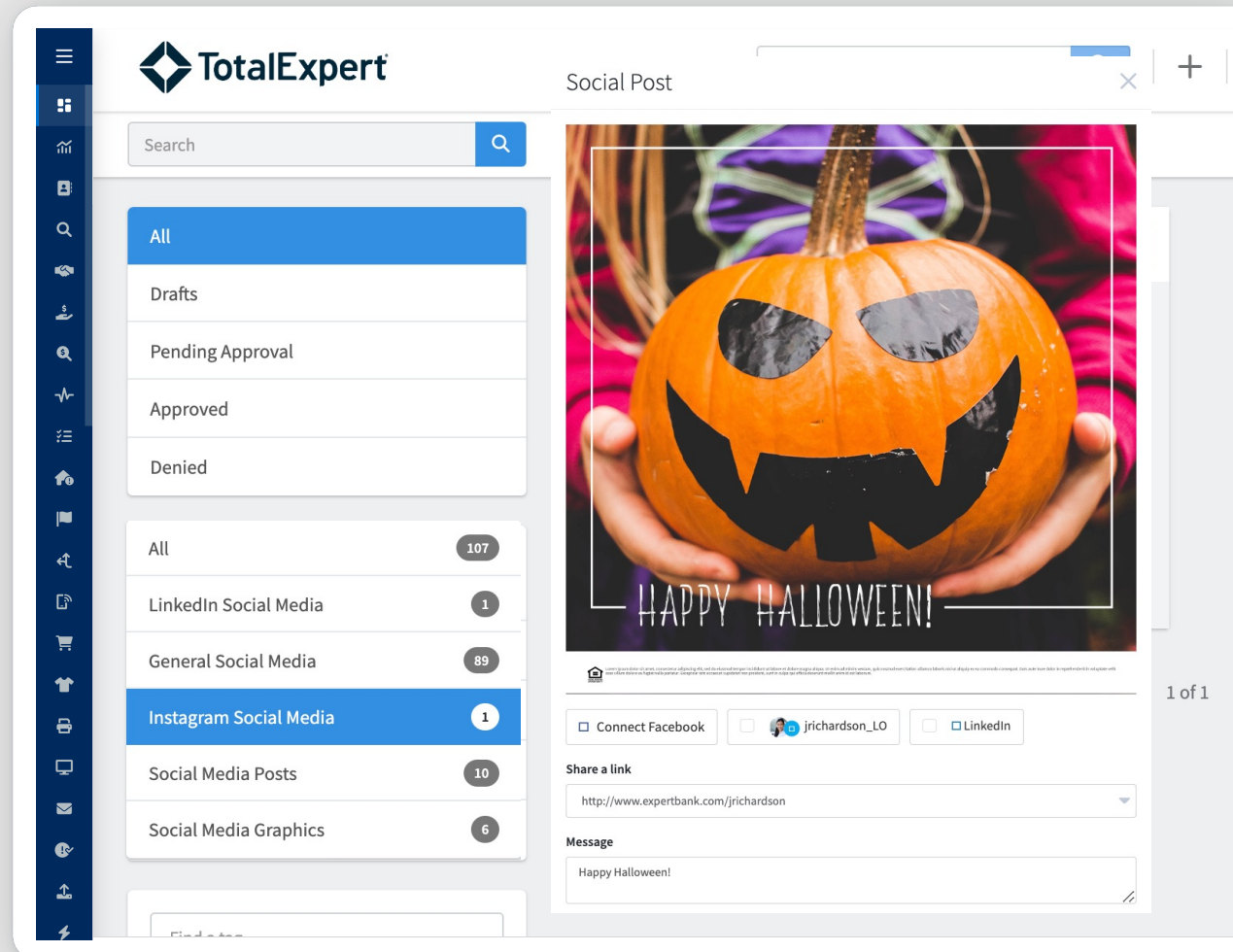
Act on insights, not instincts. View all insights for a contact on their contact details to understand their financial needs and prioritize your opportunities to serve them.

The screenshot displays the TotalExpert CRM interface. At the top, the TotalExpert logo is on the left, and a search bar labeled "Search all contacts" is on the right. Below the logo, a "Contacts" link is visible. The main section shows the contact details for "Cary McBoyle", including the address "28869 John Wall Way, Atlanta, GA 30386", the phone number "404-753-3339", and the email "username12234231+Cary.McBoyle@gmail.com". A sidebar on the left contains various icons for navigation. A modal window is open over the contact details, showing three tabs: "Activity", "Insights", and "Responses". The "Insights" tab is selected, and it displays a "CREDIT WATCH" insight with the text "A lender has pulled credit" and "Created 04/07/2022". Below the modal, a navigation bar shows tabs for "Profile", "Products", "Marketing", "Communications", "Activity", "Insights", and "Responses". The "Insights" tab is selected, and it shows "1 Insight" with a "Sort By" dropdown set to "Newest First". The insight details are: "Credit Watch", "A lender has pulled credit for a mortgage for this contact.", and "Created 04/07/2022".

IMPROVE SALES PRODUCTIVITY

Instagram Integration

Engaging content built for social sharing. Loan officers and marketing teams can share content directly to Instagram posts.



The screenshot displays the TotalExpert Social Post interface. On the left, a sidebar contains a search bar and a list of content categories: All (107), Drafts, Pending Approval, Approved, Denied, LinkedIn Social Media (1), General Social Media (89), Instagram Social Media (1), Social Media Posts (10), and Social Media Graphics (6). The 'Instagram Social Media' category is selected. The main area shows a social post with a Halloween-themed image of a carved pumpkin with the text 'HAPPY HALLOWEEN!'. Below the image, there are sharing options: 'Connect Facebook', 'jrichardson_LO', and 'LinkedIn'. A 'Share a link' section shows a URL: 'http://www.expertbank.com/jrichardson'. A 'Message' section contains the text 'Happy Halloween!'. The interface is titled 'Social Post' and includes a close button.

NEW INTEGRATIONS

Boost Sales Productivity

Expanding on Total Expert's portfolio of integrations, to provide additional data, speed up time used to log data, and round out the time-to-value process.

capacity[®]



Lender Price



milestones

Advanced Lead Management



LEAD QUALITY, VOLUME & ROUTING

In-Platform SMS Notifications

View SMS notifications, read messages, access lead records, and respond quickly to leads in the platform.

The screenshot displays the TotalExpert dashboard. At the top, there's a search bar and navigation icons. The main dashboard area includes several widgets: 'New Contacts past 24 hours' (32), 'Birthdays' (133), 'Open Tasks' (644), and 'Emails Open' (0). Below these is a 'Loan Volume' chart showing data from June 2022 to April 2023. A 'Notifications' panel is overlaid on the right, showing three messages from Bryce Danielson. A red arrow points to the notification bell icon in the top right corner.

Notifications [Clear All](#)

- Message from Bryce Danielson** *... [View](#)
- Message from Bryce Danielson** *... [View](#)
Hey!!
- Message from Bryce Danielson** *... [View](#)
How are you?

Loan Volume (Funded Date)

Legend: Grouped, Stacked, ARM, FHA, VA, Conventional

Y-axis: Loan Volume (\$0.0 to \$11M)
X-axis: Months (06/2022 to 04/2023)

Email Delivered - Ingeborg Cowden
How are things?
Email: username12234231+Ingeborg.Cowden@gmail.com
Cell Phone: 972-705-6674

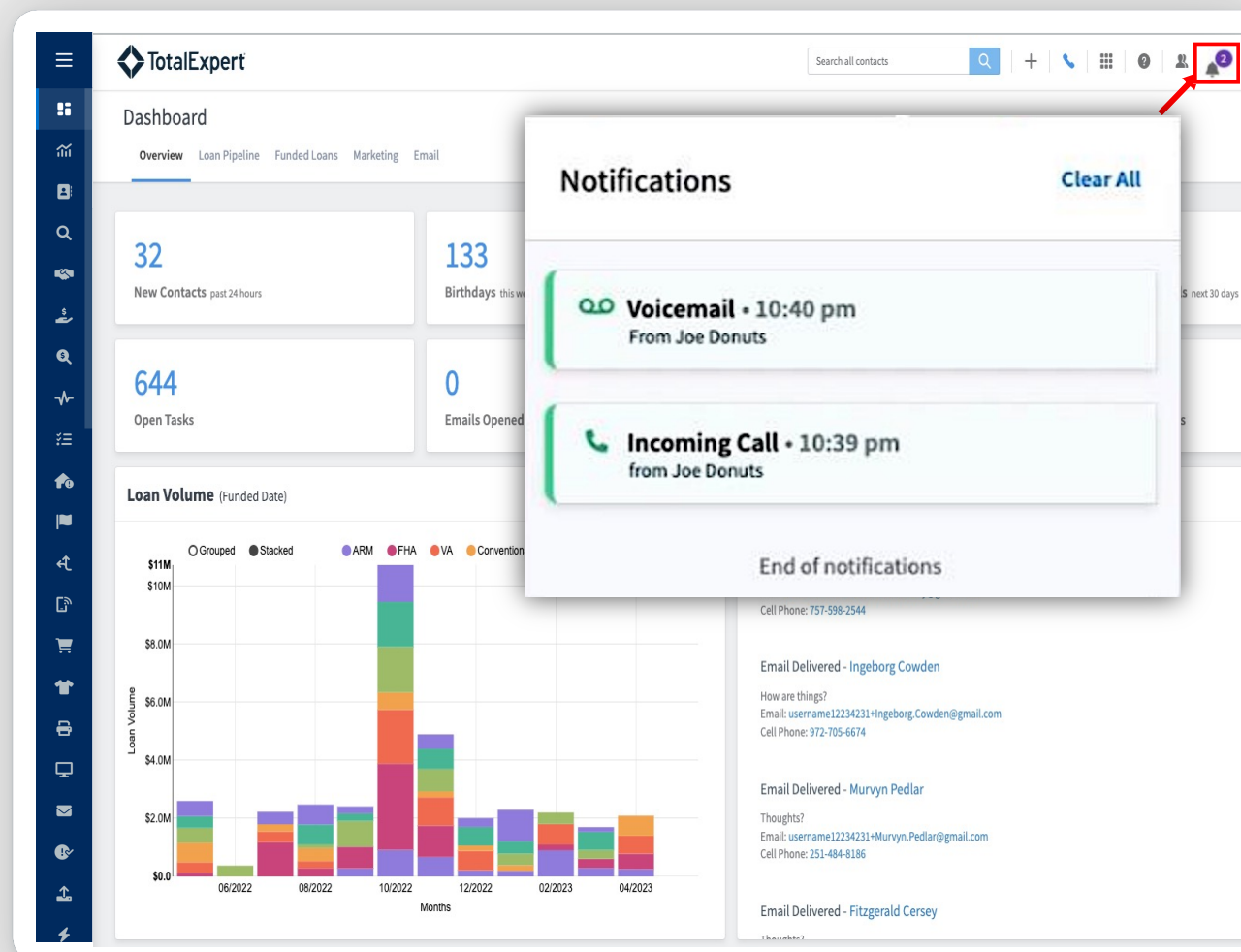
Email Delivered - Murvyn Pedlar
Thoughts?
Email: username12234231+Murvyn.Pedlar@gmail.com
Cell Phone: 251-484-8186

Email Delivered - Fitzgerald Cersey
Thoughts?

LEAD QUALITY, VOLUME & ROUTING

Lead to Voicemail

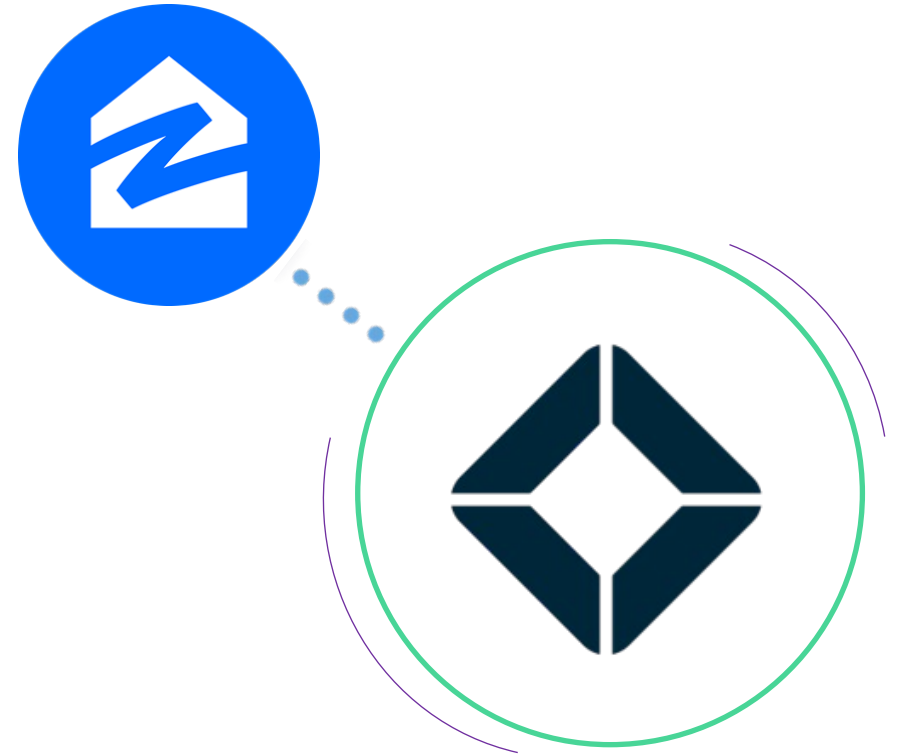
No more lost calls. Receive notifications, access voicemails, and voicemail transcripts from leads and contacts to quickly listen and call back when available.



NEW INTEGRATION

Zillow

Capture leads from Zillow with enhanced security and apply Zillow as the lead source within Total Expert.



Thank you