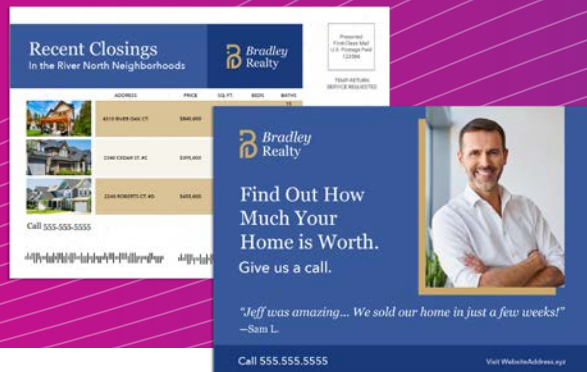




## CASE STUDY

# Total Expert Accelerates Client Growth with Seamless EDDM Integration



### Higher Customer Engagement Rates

with Direct Mail



### Differentiated Offering

Fuels Growth



#### About

Total Expert provides a purpose-built customer engagement platform for financial institutions. The platform unifies marketing, sales, and compliance solutions to help banks, lenders, credit unions, and insurance companies create deeper customer relationships and drive growth.

#### Industry

Financial Services  
Technology

#### Platform

API Integration

#### Audience

Mortgage Industry

## Overview

*Total Expert, a leader in marketing automation for financial services, continues to raise the bar by integrating forward-thinking tools that empower lenders and their partners to grow market share effectively and efficiently. The platform's EDDM (Every Door Direct Mail) integration, in partnership with PFL, exemplifies how strategic technology can drive scalable, real-world impact.*

## The Challenge: Empowering Compliant, Co-Branded Outreach

As the industry evolved, Total Expert looked to bring their increasingly sophisticated customer base additional marketing capabilities, especially tools that would allow for targeted outreach while maintaining compliance. But in the mortgage industry, executing co-marketing campaigns is not easy. Compliance concerns, complexity, and co-branding requirements often lead to abandoned efforts. Recognizing this gap, Total Expert saw a clear opportunity to simplify and streamline direct mail at scale for its originators.

Angie Dufresne, Total Expert's content operations lead, explained: "We partnered with PFL because we wanted to provide a rounded direct mail solution to our end users. Because co-marketing in a regulated environment demands structure, we wanted to ensure the platform includes the necessary safeguards to protect our customers."

## The Solution: Built-In, Plug-and-Play EDDM Functionality

Total Expert turned to PFL and its Every Door Direct Mail (EDDM) solution, quickly integrating it into their platform to create a feature that would enable clients to design, personalize, and launch localized campaigns—such as "Just Listed" or "Just Sold" neighborhood postcards—without ever leaving the Total Expert ecosystem.

For Total Expert's clients, this feature means mortgage professionals and their realtor partners can efficiently drive personalized engagement with their ideal audiences. The result, according to Dufresne, is a highly flexible tool: "Our EDDM program is embedded into our product. So, whether a lender has 100 users or 3,000, they can all leverage this feature the same way. It's really a universal tool that all of our customers can benefit from."

The integration launched smoothly and has continued to perform consistently over time. Dufresne emphasized how stable and dependable it has been over the years: "Our support teams rarely have to reach out about concerns or adjustments."

## The Result: Adoption, Impact, and Long-Term Value

Today, more than half of Total Expert's customers have used the embedded EDDM feature, a testament to both its utility and its popularity. "What's great is any customer can take advantage of the tool and this approach to strengthen their neighborhood visibility," noted Dufresne. She underscores how the EDDM solution removes a key friction point: "They don't have to try to obtain mailing lists or outdated lists they have in a spreadsheet. We offer a better, more reliable way to canvas neighborhoods and know they'll reach mailboxes."

Even in periods when mortgage rates fluctuate, the EDDM integration has proven to be an essential, baseline capability, allowing Total Expert's clients to keep building their businesses. "This capability is a table stake in our industry," Dufresne said. While she points out that granular attribution can be difficult, extended usage patterns among client subsets indicate ongoing value and customer satisfaction.

Unlike typical vendor-client relationships, Total Expert's partnership with PFL is ongoing and collaborative. "We're not a traditional use case," Dufresne said. "We're always talking about new ways to tap into what PFL can offer and what we can deliver to our customers."

## Key Takeaways

By embedding PFL's EDDM solution, Total Expert has given thousands of mortgage professionals and their partners a scalable, compliant, and low-friction channel to stay visible in their local markets. The result: stronger relationships, higher engagement, and a differentiated offering that fuels growth in any market

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**—Angie Dufresne, Content Operations Lead**

