



CASE STUDY

# Mutual of Omaha Mortgage Decentralizes Content Creation with Total Expert's Integrated Design Studio



Loan officers across the country face a frustrating challenge to create personalized marketing materials without violating brand and regulatory compliance. The Mutual of Omaha Mortgage team was no different and they needed a way to streamline collateral creation across the business and transform the way loan officers engage borrowers. So they turned to Total Expert's Integrated Design Studio, powered by MAXA.

## The Challenge

The biggest hurdle for Mutual of Omaha Mortgage was balancing independence and compliance. Loan officers needed a way to create their own marketing materials without having to involve the internal marketing team for every request.

Before adopting Integrated Design Studio, creating a simple flyer or postcard would take **2-3 days** due to the internal marketing team's workload. Requests for partner collateral, such as rate scenarios and open house materials, took even longer due to their customization needs and external reviews/approvals—causing bottlenecks.

**The challenge was clear:** How could they enable loan officers to independently create the materials they needed while ensuring compliance with brand and regulatory guidelines?

**“Assets that include things like buydown or rate scenarios are time-consuming to create internally, especially if there’s a backlog of other requests. Total Expert allows our loan officers to be more self-sufficient and create what they need faster, without worrying about compliance issues.”**

Catherine Simoneaux  
Mutual of Omaha Mortgage,  
Vice President of Marketing

# The Solution

With Integrated Design Studio, the Mutual of Omaha Mortgage's marketing team could create sales and marketing collateral templates and lock down specific content elements at the enterprise level while allowing loan officers and their teams to personalize each template on a local level.

## Key Benefits of Implementing Total Expert Integrated Design Studio

### 1. Enhanced efficiency

- Marketing team members quickly adapted to the user interface and began deploying dynamic templates to their asset library for loan officers to use.
- Turnaround time for materials decreased significantly. What previously took **2-3 days** is now completed within a **single business day**.
- Loan officers can independently create customized rate scenarios, buy-down flyers, and open house materials.

### 2. Reduced internal requests

- Positive results included a noticeable drop in the number of internal design ticket requests.
- Plans to roll out more broadly across the organization to further lower the demand for marketing team involvement

### 3. Streamlined customization & compliance

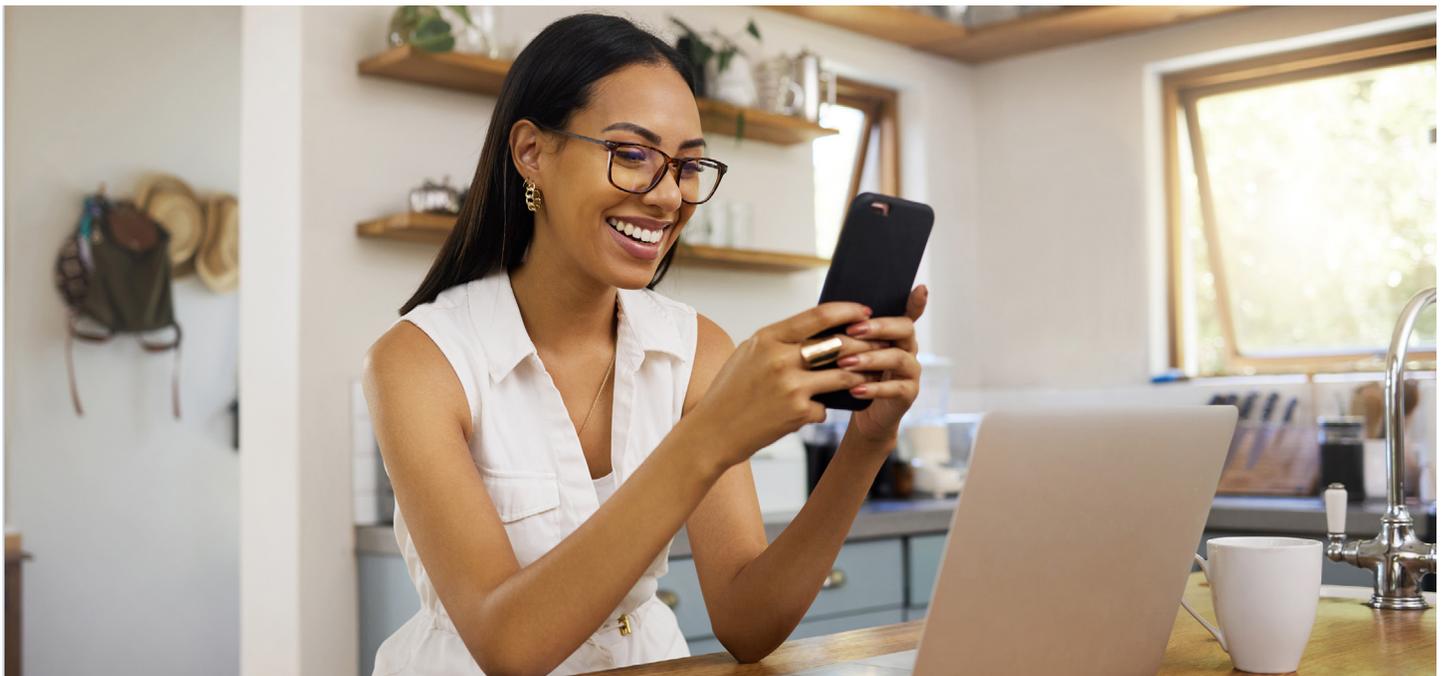
- Allows for creative flexibility while safeguarding compliance through locked-down fields and critical design elements.
- Once the marketing team built customizable templates, loan officers created more materials than ever before.

### 4. Minimal learning curve

- Seamless training with minimal follow-ups required. Out of over **25 loan officers**, only **two follow-up training sessions** were necessary after the initial session.
- With an intuitive user interface, the loan officer onboarding experience was smooth and seamless. Users were up and running the same day as training.

### 5. Targeted marketing efficiency with partners

- Integrated Design Studio became invaluable for responding to partner requests, such as preparing rate scenarios or open house flyers, without needing to involve the marketing team.
- This expedited turnaround has strengthened builder relationships and reduced response times for time-sensitive materials.



## The Results

Integrated Design Studio has already demonstrated ROI for the Mutual of Omaha Mortgage team:

- **Faster execution** of marketing materials.
- **Reduced workload** for internal marketing teams.
- **Enhanced self-sufficiency** among loan officers, enabling them to better serve clients and partners.

Upcoming features, such as MLS and pricing engine integrations, are expected to further bolster marketing operations and drive long-term success.

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## Looking Ahead

Integrated Design Studio has already strengthened the Mutual of Omaha Mortgage team's ability to remain agile and compliant in their marketing processes, and their plans to scale more broadly across the organization promise to enable even greater efficiency. The upcoming features will provide exciting new ways to engage clients, streamline processes, and elevate marketing campaigns further.

Mutual of Omaha Mortgage loan officers are using Integrated Design Studio to customize marketing materials that drive efficiencies for their business, improve borrower engagement, maintain compliance, and reduce dependency on internal teams.

Learn how Integrated Design Studio can transform the way your team creates consistent, compelling, and compliant marketing materials.

**“For us, it’s the flexibility and efficiency. Requests that normally took 2-3 DAYS for our marketing team to turnaround now take 2-3 HOURS for loan officers to complete independently.”**

**Catherine Simoneaux**  
Mutual of Omaha Mortgage,  
Vice President of Marketing





## About Total Expert

Total Expert is the purpose-built customer engagement platform trusted by more than 200 financial enterprises. Total Expert unifies data, marketing, sales, and compliance solutions to deliver the perfect customer journey across every financial milestone—in any market. Total Expert turns customer insights into actions that increase loyalty and drive growth for modern banks, lenders, credit unions, and insurance companies. Total Expert is now available for purchase on the AWS Marketplace and Salesforce AppExchange.