



CASE STUDY

HarborOne Mortgage Modernizes its Marketing with Total Expert



TotalExpert



HARBORONE[®]
Mortgage

HarborOne Mortgage Loan Officers Deliver a
Personalized Experience with Total Expert



Challenges

HarborOne Mortgage has been a leader in residential mortgage lending throughout the Northeast since 1983. Their reputation as a premier service provider has been the key to their success. As a wholly owned subsidiary of HarborOne Bank, they offer a seasoned team of experienced mortgage professionals, backed by the strength of a \$5.4B community bank. HarborOne Mortgage has steadily and purposefully grown their retail lending footprint from just a few New England states to over half of the East Coast.

But despite the lender's continued business success, leaders knew it was time to completely overhaul their marketing approach. Marketers, for instance, needed better ways to flexibly create timely, branded content HarborOne's 80+ loan officers could easily leverage for more effective, more personalized outbound marketing. And automating as many things as possible was key.

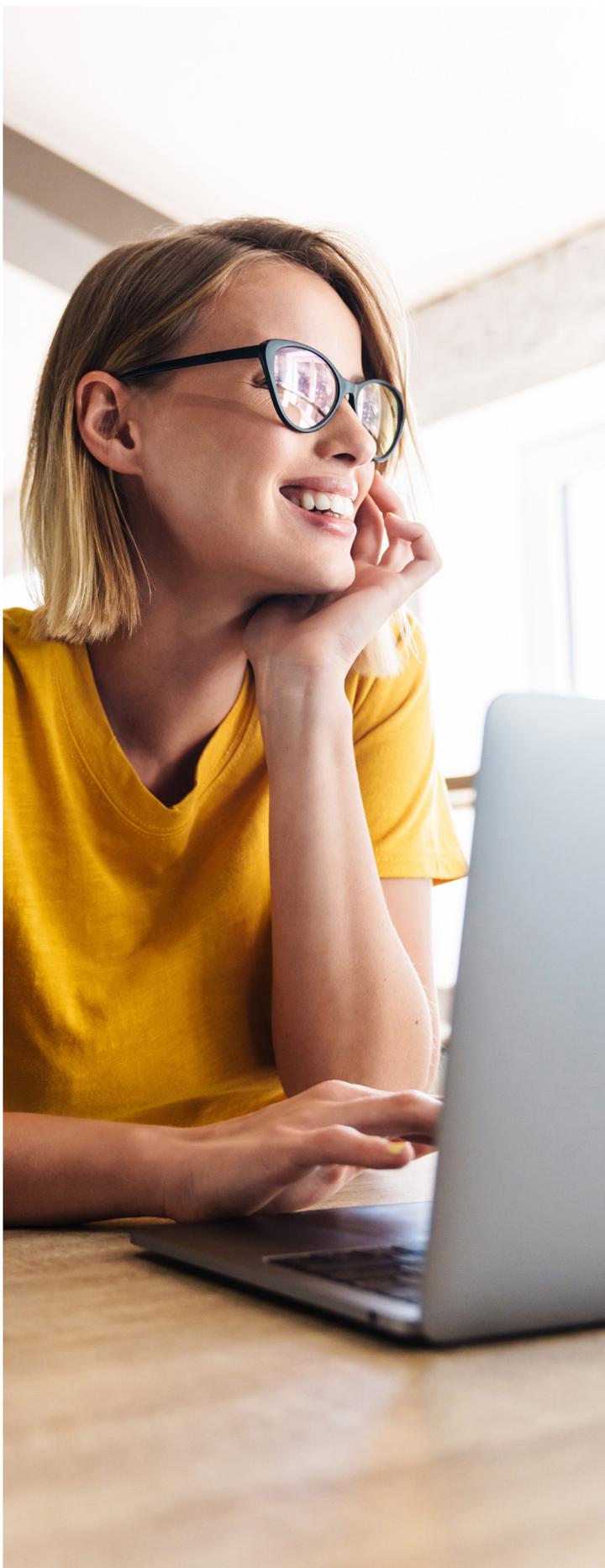
Explains Marketing Director Jaime Adams, "My goal since joining HarborOne Mortgage has been to reinvigorate the brand through modern strategies, programs, and content, and part of that was ensuring our loan officers have access to all the tools they need to be successful. Bringing on an efficient and dynamic CRM was a key step in that plan, as I knew our existing CRM was simply not up to the task."



Why Total Expert

HarborOne leaders vetted over six CRM systems before selecting Total Expert as their new CRM platform.

“One of the things we liked about Total Expert was that it comes with so much pre-built, mortgage-specific content,” Jaime says. “Total Expert became a clear front runner for us because we could see that the many nuances and complexities that come with operating within the mortgage industry were part of the system’s foundational structure. While other CRM’s were perfectly functional – our needs were simply too specific. Total Expert presented us with a clean, organized user experience, a robust and capable system at a price point that made the choice easy.”



Solution to Date

HarborOne Mortgage is currently building out its new Total Expert platform to be the eventual, one-stop shop where loan officers will be able to easily access online accurate, branded flyers and other marketing materials.

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Jaime Adams,
Marketing Director

Results to Date

Though early in the implementation, Jaime and HarborOne Mortgage’s VP/Regional Marketing Director Suzanne Fry believe their new Total Expert CRM will help their team deliver more attractive informational content that their loan officers can use to connect with prospects in stronger, more relevant ways.





About Total Expert

Total Expert is the leading fintech software company that delivers purpose-built CRM and customer engagement for modern financial institutions. Total Expert unifies data, marketing, sales, and compliance solutions to provide a cohesive experience across the customer lifecycle. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and other financial services firms.