



CASE STUDY

First Heritage Mortgage Reignites Growth

Smarter Engagement and
Unmatched Loan Officer Adoption



TotalExpert



FIRST
HERITAGE
MORTGAGE

The situation:

Fragmented and Unmatched Loan Officer Adoption.

First Heritage Mortgage (FHM) had experienced the benefits of Total Expert in the past—but like many fast-growing organizations, they reevaluated their tech stack as business needs evolved. After spending several years on an alternative platform, the marketing team quickly recognized gaps in service, innovation, and customization.

“We had one platform for flyers, another for email, and people were still saving assets on their desktops. It was clunky and inefficient. We needed a centralized solution that could scale, support our tech stack, and empower our originators to build their brands.”

– Erica Goodwin, SVP of Corporate Marketing

FHM sought a partner that delivered not just software, but ongoing innovation and responsive support. After evaluating the market, they chose to return to Total Expert—this time, with a renewed strategy and long-term vision.

The solution:

A Unified, Customizable Marketing Engine

From day one of the renewed partnership, FHM took a hands-on, strategic approach to reimplementing Total Expert—aligning marketing, production, and business systems teams to build a platform originators would trust and use.



Key elements of the solution included:

- **Centralized Marketing Hub:** All email, print, customer Journeys, and content assets were rebuilt in Total Expert—eliminating fragmentation and manual processes.
- **Customized Journeys:** Tailored by lifecycle stage, these Journeys aligned with FHM's brand voice and top producer needs—offering opt-in, automated communications that originators could personalize.
- **Tech Stack Integration:** Connections with Mortgage Coach, Encompass, nCino, and RETR gave FHM the ability to automate meaningful outreach, track lead engagement, and route tasks to the right teams.
- **Customer Intelligence:** By moving firm offer-of-credit communications to email and layering in automated Journeys and originator tasks, the team created faster, smarter engagement moments.

"Total Expert helped us consolidate everything under one roof, and the implementation team made us true platform experts. We're able to move quickly and support every type of originator—from 'set-it-and-forget-it' to hyper-customized workflows."

- Erica Goodwin, SVP of Corporate Marketing

The results:

Higher Adoption, Stronger Engagement, and True Differentiation

FHM's focused rollout strategy and weekly enablement programs have led to standout platform engagement across the board:



ADOPTION & ENGAGEMENT

52% 

of originators sent direct emails through Total Expert in Q1 2025
(21% higher than the industry average)

48% 

of originators logged in 12+ times per quarter
(13% higher than the industry average)

65% 

used print collateral
(15% higher than the industry average)

21% 

used single-property websites for co-marketing partners
(11% above the industry average)

CONTENT PERFORMANCE

400+ print flyers built and available

48% open rate on customized journeys

36% average email open rate across the board

OPERATIONAL WINS

- Implementation included **daily training for two months**, followed by **weekly live sessions** to maintain momentum
- Print asset creation time reduced to **15 minutes per flyer**
- Easy-to-deploy campaigns in response to market changes—such as rapid updates to communicate new crypto guidelines or rate shifts

STRATEGIC ENABLEMENT

- Support for personal branding and co-marketing without complexity
- High-value integrations activated to support sales and marketing alignment
- Future-ready: website forms will soon flow into Total Expert to enable lead routing and attribution



We've never had this level of platform engagement before. Our originators trust it, use it, and are getting results. Total Expert is a true partner—constantly pushing us forward.

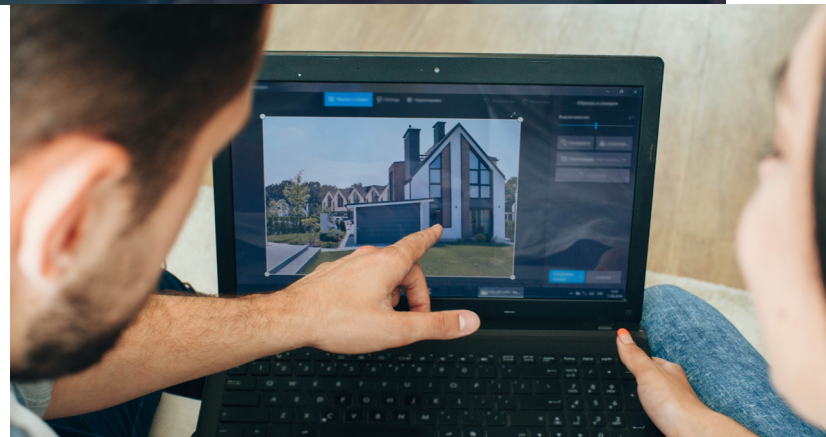
– Erica Goodwin, SVP of Corporate Marketing



Looking ahead:

Continued Growth and Smarter Connections

As First Heritage Mortgage expands into new markets, Total Expert will remain at the core of engaging new leads, activating regional strategies, and delivering seamless customer experiences.



“With Total Expert, we’re finally able to tie everything together. The technology is there, but *the partnership is what really sets it apart.*”

– Erica Goodwin, SVP of Corporate 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.