



CASE STUDY

From Sticky Notes to Scalable Systems



A close-up photograph of a person's hands holding a silver and black pen over a document. The document has several light blue sticky notes attached to it. The background is blurred, showing a desk and a chair.

Arvest had seen great results using Total Expert to facilitate marketing campaigns and create branded collateral, but they still faced challenges getting their originators to use the platform beyond the surface level. Only a handful of their loan officers were using Total Expert to actively manage relationships, organize their database, and uncover new opportunities.

The Challenge

That gap in adoption created real business risk. Originators were often relying on homegrown spreadsheets, legal pads, sticky notes, and disconnected calendar tools to manage their books of business. As a result, valuable customer information and follow-up activities weren't tied back to the contact record, making it harder to stay organized, act consistently, and capitalize on opportunities that might otherwise be missed.

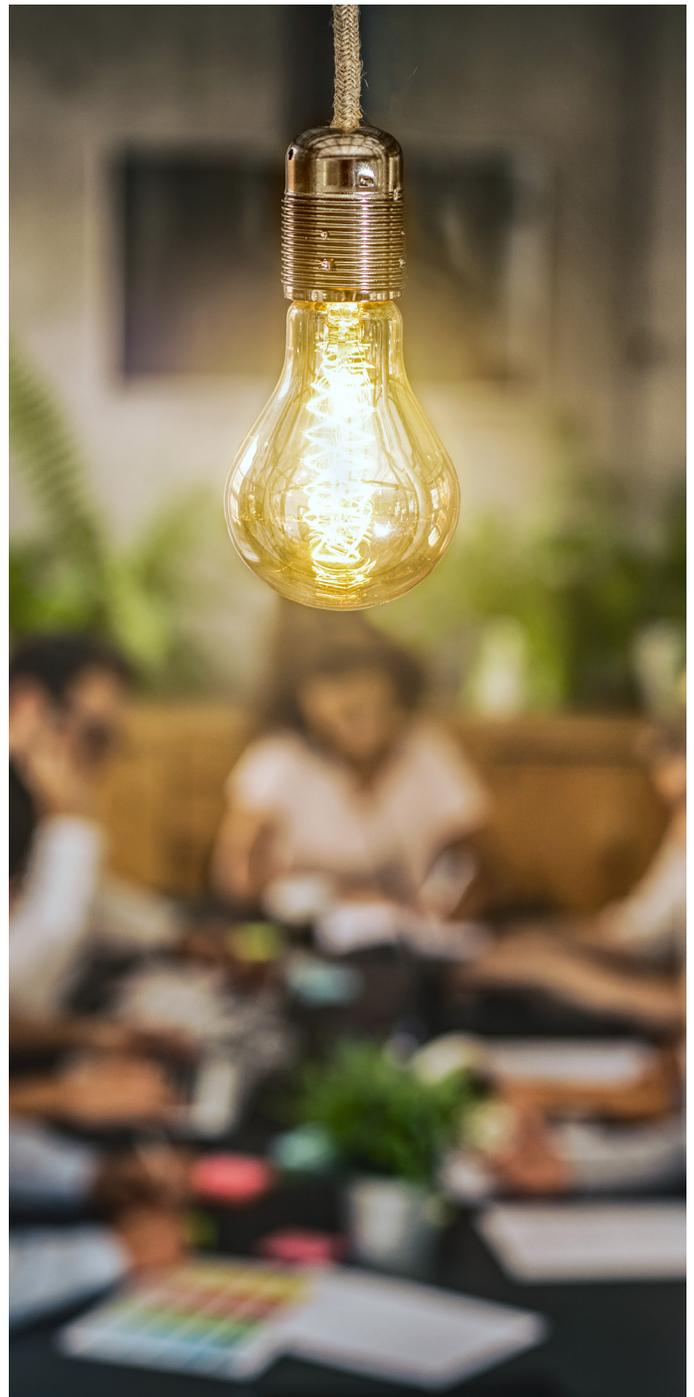
The goal was to make Total Expert practical, approachable, and a part of every originator's daily workflow. Once originators saw how it fit into their day-to-day, adoption followed.

The Solution

To address the issue, Arvest rolled out a series of focused training sessions to showcase Total Expert in a simpler, more practical way for busy originators. The goal was to remove the intimidation factor, show originators exactly how to use the platform in a straightforward way, and connect Total Expert directly to their day-to-day workflow. The sessions emphasized how to organize a large book of business into manageable groups, use tasks to drive follow-up, and leverage the platform to engage contacts proactively rather than responding reactively.

The Results

The result was stronger awareness and positive momentum around adoption, not just from new originators, but also from seasoned loan officers willing to give it another try. Leadership and marketing administrators at Arvest received strong feedback from these sessions and are using that momentum to drive greater utilization across the sales organization. Just as importantly, the effort helped bridge the gap between marketing and sales by moving Total Expert beyond an admin- and marketing-led toolset and positioning it as a shared platform that originators can use to manage relationships, uncover opportunities, run their day-to-day business more effectively, and ultimately help more families find a home.





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.

TotalExpert.com

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