



CASE STUDY

USA Mortgage Finds Early Momentum with Admin Copilot





The Situation

Like many lenders, USA Mortgage's internal teams face the challenge to balancing how they support originators, serve customers, build brand awareness, and ensure they're getting the most out of investments in technology like Total Expert. As priorities shifted and admin resources focused on ongoing business needs, they saw an opportunity to bring in additional expertise to help accelerate execution, optimize configuration, and keep momentum moving without adding operational strain.

That's where our new Admin Copilot offering came in. Designed to act as an extension of their team, Admin Copilot gave USA Mortgage direct access to a dedicated Total Expert Technical Account Manager who provided both long-term strategic guidance and immediate hands-on support.

The Solution

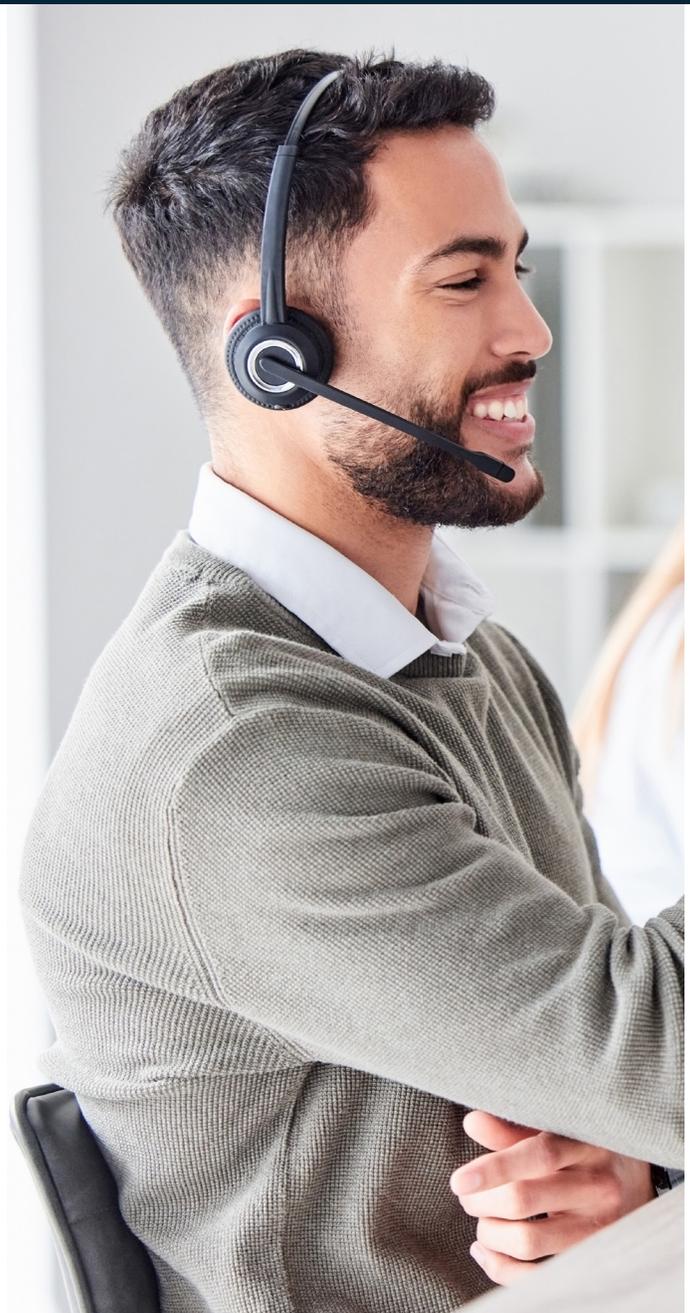
Early on, that meant helping USA Mortgage move faster on key initiatives, reduce the burden on internal admins, and enhance how USA Mortgage was leveraging Total Expert to engage customers and drive growth across business units.

For USA Mortgage, having dedicated access to a person who not only understands the ins and outs of Total Expert but also USA Mortgage's business needs and goals has already been a game changer. Rather than relying solely on internal bandwidth or one-off project requests, they've been able to adjust and improve how they're using Total Expert to execute projects, increase efficiency, and better serve their customers.

Admin Copilot is a value-added service that gives financial organizations access to a dedicated Total Expert resource who will act as an extension of their team. Admin Copilot helps accelerate adoption, optimize platform configuration, and unlock faster time-to-value through a mix of strategic guidance and hands-on execution.

Learn how Admin Copilot can help extend your team's capabilities and ensure you get the most out of Total Expert

[Explore Admin Copilot >](#)





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.