



CASE STUDY

Driving Mortgage Growth Through a Customer-Centric Digital Strategy





First United Mortgage Group partnered with Total Expert to modernize its customer engagement strategy, resulting in strong loan officer adoption, scalable automation, and measurable loan volume directly tied to customer behavior insights.

Within months of going live, First United equipped its mortgage team with a unified platform that aligned marketing, sales, and data to create immediate value and long-term scalability.

Organization overview

First United Bank is a community-focused financial institution serving Oklahoma and Texas. The mortgage division plays a critical role in supporting the bank's mission by guiding customers toward sustainable homeownership while maintaining deep local relationships.

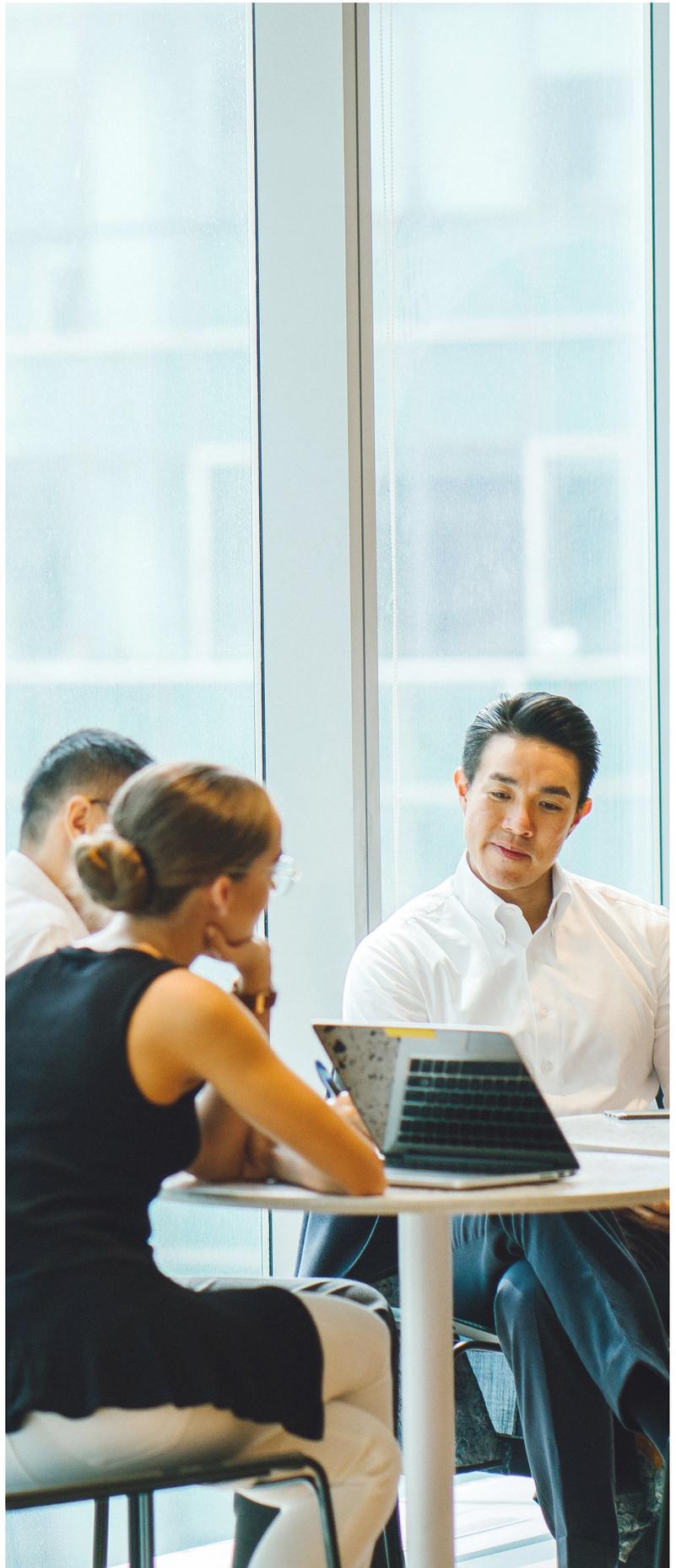
As the mortgage market has evolved, the organization recognized the need for a modern, purpose-built platform that could support both growth and consistency across its loan officer network.

A strategic approach

First United took a deliberate approach to enhancing its mortgage marketing and customer engagement strategy. The focus was on deploying a solution that could:

- Empower loan officers with intuitive tools they would use
- Deliver consistent, on-brand communication at scale
- Surface timely customer insights that support proactive outreach
- Reduce manual effort for both sales and marketing teams

Total Expert emerged as the platform that could bring these goals together in a single, cohesive system.



The Solution: Total Expert

First United implemented Total Expert and quickly provided loan officers with a fully operational CRM and marketing platform, including:

- Automated in-process and post-close customer Journeys
- Scalable newsletters, holiday communications, and enterprise campaigns
- High-quality, ready-to-use marketing assets
- Customer Intelligence alerts highlighting credit activity, listing behavior, and engagement signals
- Built-in tasks tied to insights to support consistent and timely follow-up

With these capabilities in place, loan officers began engaging with the platform daily, confidently managing their own outreach while benefiting from automation running in the background.



Measurable impact & results

Customer Intelligence-driven loan volume

Within the first months of launching Customer Intelligence, First United Bank directly attributed closed loans to Customer Intelligence alerts—representing millions of dollars in retained or recaptured loan volume. These insights enabled loan officers to identify opportunities and risks earlier and act with confidence.

Faster time-to-value

- Total Expert implemented and actively used across the mortgage team within 90 days
- Loan officers equipped with workflows and campaigns that delivered immediate impact

High loan officer adoption

- 100+ loan officers actively using Total Expert
- Strong daily engagement driven by intuitive workflows and relevant tools
- Loan officers independently initiating campaigns and managing communication

Stronger, more consistent communication

- Improved engagement metrics across email campaigns
- Consistent, branded messaging delivered automatically
- Reduced reliance on manual, one-off marketing requests

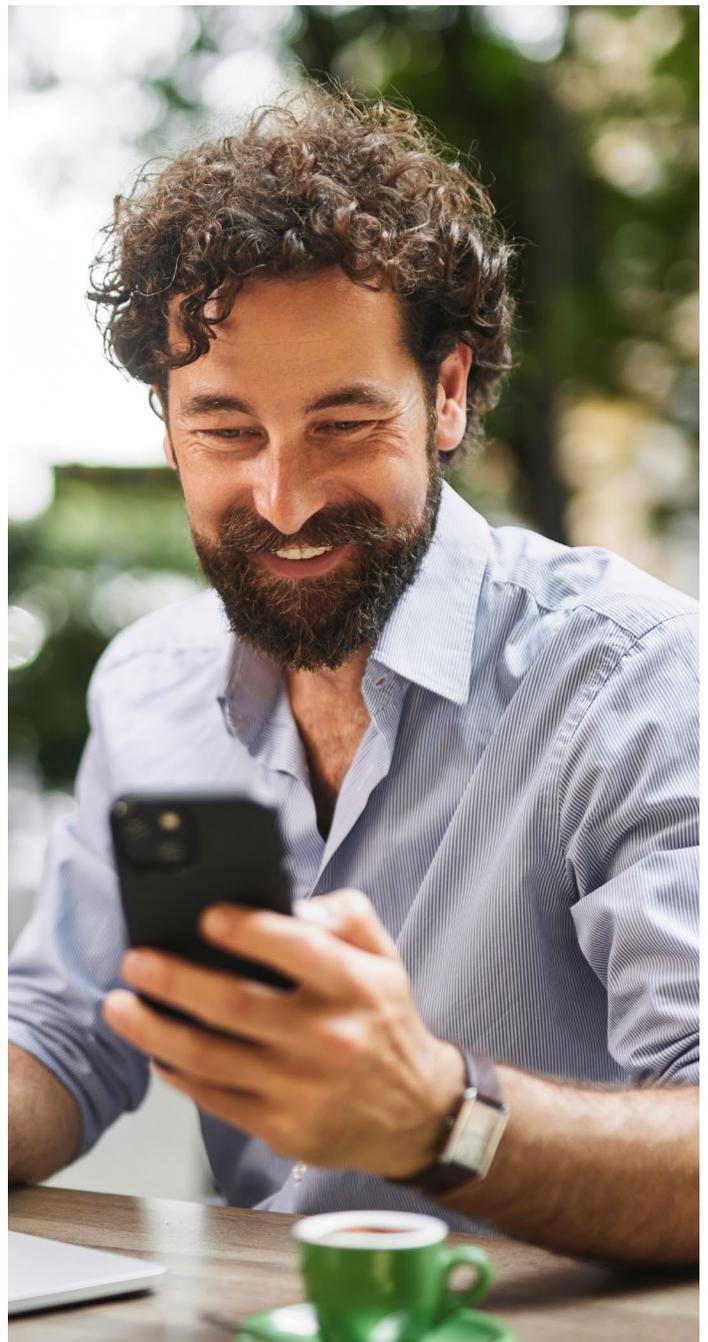
Operational efficiency across teams

- Referral partners access co-branded materials through the platform
- Loan officers spend less time on manual marketing tasks
- Marketing teams focus more on optimization and strategy rather than execution support

With the right insights and automation in place, loan officers could focus less on manual tasks and more on building meaningful customer relationships.

Looking ahead

Total Expert has transformed how First United Bank's mortgage division engages customers and supports its loan officers—delivering clear ROI today while establishing a scalable foundation for future growth. With the right insights, automation, and alignment in place, the organization is well-positioned to deepen relationships and compete effectively in any market.





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.