

## **Total Expert is Now Available in AWS Marketplace to Help Financial Institutions Maximize Technology Spend Amid Market Disruption**

Total Expert's purpose-built customer engagement platform can now be purchased directly through the AWS Marketplace

**MINNEAPOLIS – April 18, 2023** – [Total Expert](#), the customer engagement platform purpose-built for modern financial institutions, is now available in AWS Marketplace, a digital catalog with thousands of software listings from independent software vendors that make it easy to find, test, buy, and deploy software that runs on Amazon Web Services (AWS).

Accessing Total Expert in AWS Marketplace can help financial institutions to reduce additional spend by applying existing AWS budget to their purchase of Total Expert. In addition to direct cost savings, purchasing Total Expert in AWS Marketplace includes legal contract reviews and due diligence processes, thus reducing time to market and accelerating the adoption, value, and results of using the platform.

Total Expert [Customer Intelligence](#) allows banks, lenders, and insurance companies to easily connect data sources and immediately act on customer insights. By enriching customer profiles with multiple data sources, organizations have visibility into customer intent and can provide relevant education and offers. These comprehensive customer profiles are then added directly into the platform's customer journey orchestration, which automates critical parts of the customer journey, such as reminding an advisor or loan officer to engage with a past customer with educational content on available options.

Since [launching Customer Intelligence](#) in 2022, Total Expert has surfaced insights and automated customer journeys that have led to over \$9B in loan applications; many of these loans stemmed from re-engaged leads and former customers that had fallen through the cracks.

"The Total Expert platform powered more than 36% of all U.S. home mortgages in 2022. Clearly, we are a critical growth and retention tool for financial institutions, and we constantly look to reduce barriers to adoption," said [Patrick Hanley](#), vice president of partner ecosystems at Total Expert. "Being listed in AWS Marketplace is one way we can do that. And our deep base of integrations with leading SaaS platforms such as Salesforce, Zillow, LendingTree, Meta, and many other fintech companies continue to enrich our comprehensive profiles for a holistic view of each customer across business segments."

AWS Marketplace Vendor Insights also allow financial institutions who purchase Total Expert through AWS to access security and compliance information in a single unified dashboard, simplifying risk assessments and supporting necessary compliance controls.

To find Total Expert in AWS Marketplace, go to <https://aws.amazon.com/marketplace/pp/prodview-rvb3fsido2rao?sr=0-1&ref=beagle&applicationId=AWSMPContessa>.

### **About Total Expert**

[Total Expert](#) is the purpose-built CRM and customer engagement platform trusted by more than 175 financial enterprises. The platform unifies data, marketing, sales, and compliance solutions to deliver the perfect customer journey across every financial milestone. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and insurance companies, and is now available to purchase through the [AWS Marketplace](#) and [Salesforce AppExchange](#). For conversations between modern banks and lenders on leadership and innovation, listen to the [Expert Insights](#) podcast hosted by Founder and CEO Joe Welu. For more information, visit [totalexpert.com](https://totalexpert.com).