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**Total Expert Announces Updates to Total Expert on Salesforce AppExchange,
the World's Leading Enterprise Cloud Marketplace**

*Total Expert's customers can now benefit from intelligence-driven automation and tools purpose-built
for financial institutions*

Minneapolis, March 28, 2023 – [Total Expert](#) today announced it has updated Total Expert on Salesforce, AppExchange, providing customers new ways to enhance the ROI of their Salesforce integrations. By leveraging Total Expert, financial institutions can identify more sales opportunities, extend the personalization and customization of prospecting and marketing activities, and act quickly on customer intelligence data to attract more borrowers, close more deals, and create happier, more loyal customers.

Integrated directly with Sales Cloud and Financial Services Cloud, Total Expert is currently available on AppExchange at

<https://appexchange.salesforce.com/listingDetail?listingId=a0N4V00000GI7QaUAJ&tab=e>.

The Total Expert platform powered more than [2.1M mortgage loans](#) in 2022, representing 36% of total U.S. home loan volume, making it the most widely used intelligent marketing automation and customer engagement platform for loan officers. Based on each bank, credit union, or mortgage company's contacts in Salesforce, Total Expert sends alerts via its [Customer Intelligence](#) solution. Customer Intelligence notifies users if any of their monitored contacts pass an equity threshold, list their home on the market, could benefit from a current rate, or when another lender pulls their credit. These actions are directly surfaced into existing Salesforce workflows and allow teams to reach out quickly to potential borrowers that may be ripe for opportunity.

In addition to Customer Intelligence, other Total Expert features now available include:

- RESPA-compliant resources that allow users to create co-marketing materials
- Ready-to-use branded materials that can be easily customizable to include a user or partners photo and contact information
- Intelligent automation purpose-built for financial services to deliver personalized, well-timed marketing to align with evolving financial needs

Total Expert has simplified how loan officers access approved and compliant marketing and prospecting materials, making it even easier to follow up on flagged leads, customize the materials based on the alerts, and close more deals.

Comments on the News

- “Financial institutions increasingly want to maximize investments in the tech stack and Salesforce in particular. This integration allows them to leverage their existing Salesforce data and workflows to create more revenue-generating opportunities much faster,” said [Joe Welu](#), founder and CEO of Total Expert. “Loan officers already using Total Expert within Salesforce are seeing an increase in the volume of opportunities available to them and a decrease in the amount of time required to create highly personalized, compelling offers.”
- Through the new Total Expert for Salesforce managed package, onboarding and mapping of data takes as little as a few hours and no more than a few days of dedicated time,” said [Patrick Hanley](#), vice president of strategic alliances at Total Expert. “For users of both Total Expert and Salesforce, this direct connection will allow them to turn their existing database and tech stack into an appreciating and lead-generating asset.”
- “We are excited that Total Expert is continuing to innovate on AppExchange as they help financial institutions turn customer insights into actions to increase loyalty and drive growth,” said David Lee, vice president, product management, Salesforce AppExchange. “AppExchange is constantly evolving to meet the needs of our customers, and we love watching our partners evolve alongside us.”

About Salesforce AppExchange

Salesforce AppExchange, the world’s leading enterprise cloud marketplace, empowers companies, developers and entrepreneurs to build, market and grow in entirely new ways. With more than 7,000 listings, 11 million customer installs and 117,000 peer reviews, AppExchange connects customers of all sizes and across industries to ready-to-install or customizable apps and Salesforce-certified consultants to solve any business challenge.

Additional Resources

- Like Salesforce on Facebook: <http://www.facebook.com/salesforce>
- Follow Salesforce on Twitter: <https://twitter.com/salesforce>
- Follow Total Expert on LinkedIn: [Total Expert: Overview | LinkedIn](#)
- Follow Total Expert on Twitter: [Total Expert \(@TotalExpertInc\) / Twitter](#)

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About Total Expert

[Total Expert](#) delivers purpose-built, data-driven customer engagement solutions for more than 175 modern financial institutions. The platform unifies data, marketing, sales, and compliance solutions to provide a cohesive experience across the customer lifecycle. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and other financial services firms. For more information, visit totalexpert.com. For conversations between modern banks and lenders on leadership and innovation, listen to the [Expert Insights podcast](#), hosted by founder and CEO Joe Welu.

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