

## CUSTOMER INTELLIGENCE

# Surface Borrower Intent with Consumer Insights & Signals

After record years, the mortgage market is shifting from refinance to purchase – and it's predicted that volumes will be lower, too. Combine this with the lowest consumer retention rates in 15 years, and it's clear that banks and lenders must adapt to stay competitive in the new market.

With Total Expert's Customer Intelligence module, drive growth and build retention with access to key consumer insights to build relationships for life. Trigger alerts about consumer actions in the Total Expert platform and use our best-practice playbooks to convert – *proven to deliver a 10% increase in lead to application and grow retention by 2x.*

## KEY ALERTS INCLUDED IN CUSTOMER INTELLIGENCE



### Mortgage Credit Inquiry Alert

Know when a lender pulls credit for a mortgage on someone in your database.



### Rate Alert

Identify when a borrower can benefit from a current rate.



### Equity Alert

See when a borrower reaches a target combined loan-to-value (CLTV).



### Listing Insights

Get an alert when a borrower's home is listed on the MLS.

## How It Works

Customer identifies monitorable contacts

Triggered alerts associated with contact records

Intelligent automation personalizes outreach at scale