



CASE STUDY

# FirstBank Leverages Total Expert to Transform Customer Engagement





Since 1906, FirstBank has been serving communities in the southeastern U.S. to empower residents and small business owners in their financial journeys. In the past 115 years, FirstBank has grown from a small community bank in West Tennessee to a regional leader with more than \$11 billion in assets.

## At a Glance

### The Situation

FirstBank's mortgage marketing team relied on multiple platforms to provide loan officers the collateral and tools they needed to build partner and borrower relationships.

### The Solution

As an all-in-one CRM and marketing engagement solution, Total Expert transformed customer engagement with intelligent automation and sales productivity tools.

### The Success

- One platform for loan officers to manage engagement
- 20% boost in productivity across the marketing team and loan officers
- Personalization at scale for a better partner and borrower experience

## The Situation

The lean marketing team supporting the mortgage division at FirstBank were challenged with juggling multiple platforms while ensuring that their loan officers had the resources they needed to nurture partner relationships, support new leads in the pre-purchase process, close loans, and build customer loyalty.

"We relied on numerous systems to get the information we needed to create marketing assets and resources for our loan officers," said Laura Byrum, vice president of mortgage marketing, FirstBank. "On top of the time it took to create the resources, having to work across multiple platforms was holding us back."

The marketing team sought a single platform solution that would help streamline and further automate many of the everyday processes to elevate their support to their loan officers and empower them to focus where it mattered most: building a better customer experience with their borrowers.



## The Solution

FirstBank selected Total Expert for its all-in-one CRM and marketing functionality, giving them a seamless experience from lead acquisition to conversion to lifelong customer.

Journey Creator empowers the team to build education-based nurture campaigns for key audiences like first-time homebuyers and those in the loan process.

“Journeys makes it so easy for us to communicate and meet contacts where they are in the mortgage application process,” said Byrum. “It also gives us the flexibility to further tailor communications based on key behaviors and data triggers, which has elevated our ability to personalize at scale.”



Beyond borrowers, loan officers use Total Expert to nurture and build relationships with key real estate partners. Through its co-marketing functionality, loan officers can easily add and communicate with real estate partners in the system, while collaborating on co-marketing materials.

“From empowering our compliance officer with access to the system to engaging real estate partners with text messages, Total Expert gives our loan officers the tools they need to build productive and successful relationships,” said Byrum. “The platform makes it easy for loan officers to see where they should focus their time – and that’s been monumental in building relationships with their partners.”

Because Total Expert has a single data model for marketing automation and CRM functionality, the seamless flow of data makes it easy to segment and trigger high-touch engagements based on interactions with automated emails.

“Features like Focused View gives our loan officers insight into who to reach out to and when,” said Byrum. “It automatically prioritizes their outreach to ensure they are engaging with the highest priority contacts, which then funnels into our marketing activities for a holistic outreach strategy.”

The marketing team was also able to overcome one of their biggest challenges: simplifying the process to create marketing assets with MLS data. Within Total Expert, they seamlessly pull the MLS market information they need into pre-defined templates, which offer flexibility for the team to edit as needed.

“Using the pre-built content in the system with the MLS data integration meant we saved a lot of time in our processes, but also helped us get to market faster – which has been a significant benefit of Total Expert,” said Byrum.

**“Streamlining our processes with a single solution that furthered our automation capabilities enabled us to check the box for a lot of priorities on our wish list, which means we can do more than ever before.”**

Laura Byrum

Vice President of Mortgage Marketing, FirstBank

## The Success

For the mortgage division at FirstBank, one of the key wins with Total Expert was bringing everything into a single platform – from social media graphics to emails to CRM functionality.

“Now that our loan officers don’t have to track information in several systems, they can spend more time on what matters – building relationships with their partners and borrowers,” said Byrum.

In addition, Total Expert enables the team to personalize at scale. This gives them the opportunity to communicate to a segment of their database with a message that resonates with where the contacts are in their financial journeys.

“Focusing on personalization driven by data transformed how we were able to target our communication to our borrowers,” said Byrum. “Total Expert enables us to do this at scale, saving time for our teams while providing a better experience to our leads and contacts.”

Total Expert has helped boost productivity by over 20%, which has enabled the team to get to market faster.





## 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.

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