



## CASE STUDY

# CIVIC Financial Services Simplifies Engagement and Empowers Sales





CIVIC Financial Services is a private money lender, specializing in the financing of non-owner-occupied residential investment properties. CIVIC provides real estate investors and mortgage loan officers with a fast and cost-effective financing solution for their real estate investment needs.

## At a Glance

### **The Situation**

CIVIC sought a solution to help drive lead conversions while creating a better customer experience.

### **The Solution**

Total Expert offers intelligent automation, compliance management capabilities, and purpose-built functionality for its team.

### **The Success**

- One platform to manage all marketing initiatives.
- 94% account executive adoption.
- 50% increase in lead conversion.



## The Situation

As a fast-growing company in the lending industry, CIVIC Financial Services needed a technology partner to help its sales and marketing teams scale and grow. CIVIC had no problem acquiring leads; but instead, found that leads were often stuck in the funnel.

Nearly 40% of leads in the company's CRM never left the new lead status – mostly because account executives didn't have enough time in the day to manage the leads within their queue.

"We needed to leverage automation to bridge the gap in converting leads, while giving our account executives the tools they need to improve communication," said Carolyn Pham, marketing program manager, CIVIC.

The team also sought a solution that would help improve lead management while offering controls over messaging and marketing across the organization to create a better experience for its contacts and customers.

## The Solution

CIVIC Financial Services replaced its disparate marketing tools with Total Expert, focusing on leveraging its intelligent automation, compliance-management capabilities, and purpose-built functionality for loan officers.

Total Expert allowed CIVIC to combine print, social, and email marketing management in one system – making it extremely easy for the team to manage while adding in essential brand and compliance controls in the process.

CIVIC marketing team first focused on building out always-on nurture capabilities via Journey Creator to help improve communication to new leads to drive towards conversion. In doing so, the team established regular cadences to stay in front of new leads while triggering follow-up opportunities for account executives to focus on targeted communication with a personal touch.

“Our Total Expert auto campaigns and journeys have had an incredible effect on our closed loan volume for our company-provided leads. For the first three months of our lead follow-up Journey, we saw a 101% increase in lead conversion as compared to the preceding three months before

roll-out,” said Ian Rosenberg-Russell, digital marketing manager, CIVIC. “We continually tweak and modify our custom-made email templates and journeys to be the most effective that they can be. Without a doubt, Total Expert is instrumental in closing the communications gap for the success of our account executives.”

“With Total Expert, we are able to leverage pre-approved custom templates for things like customizable flyers with an established approval process for changes,” continued Pham. “The addition of compliance management – both for our brand standards and regulatory requirements – has made it a lot easier for us to support our account executives.”

In addition to supporting account executives with email marketing, Total Expert offers co-marketing to help account executives build relationships with partners. Account executives leveraged this functionality to compliantly automate, drive business, and refer leads by using email, social, and print marketing materials to accelerate improved conversions.

**“For the first three months of our lead follow-up Journey, we saw a 101% increase in lead conversion.”**

Ian Rosenberg-Russell  
Digital Marketing Manager

# The Success

Maintaining momentum in today's challenging market meant that CIVIC needed an automated solution that simplified engagement and empowered account executives to focus on high-touch relationships to drive higher conversion rates.

Within the first nine months, the team focused on building out a robust library of content that was unique to its business and personalized to where contacts were in their financial journeys. In addition, the marketing team collaborated with the Total Expert team to build out training schedule with live trainings, on-demand video sessions, and engagement materials to ensure CIVIC's end users understood the value that Total Expert brought to their day-to-day work.

As a result, CIVIC Financial Services reached 94% of adoption for the Total Expert, with account executives accelerating partnerships with co-marketing and leveraging multichannel campaign resources, including print, email, and social media.

In addition, the marketing team saved hours of manual work with the addition of intelligent automation via Journey Creator and compliance controls, automating two crucial needs within the organization.

"Having everything under one umbrella where we can control it on the marketing team has been very helpful for us," said Ian Rosenberg-Russel, digital marketing manager, CIVIC.

Lead conversion, which was a key problem for CIVIC Financial Services as well, has increased significantly – in fact, one nurture campaign drove nearly 50% growth in lead conversion in the first three months.

"Total Expert has proven to be an indispensable asset to our marketing in a relatively short period of time," said Pham. "From increased lead conversions and highly-curated content to relationship building with our partners, Total Expert is our company's go-to platform for our account executives' successful marketing and branding."



94%

adoption of  
Total Expert.

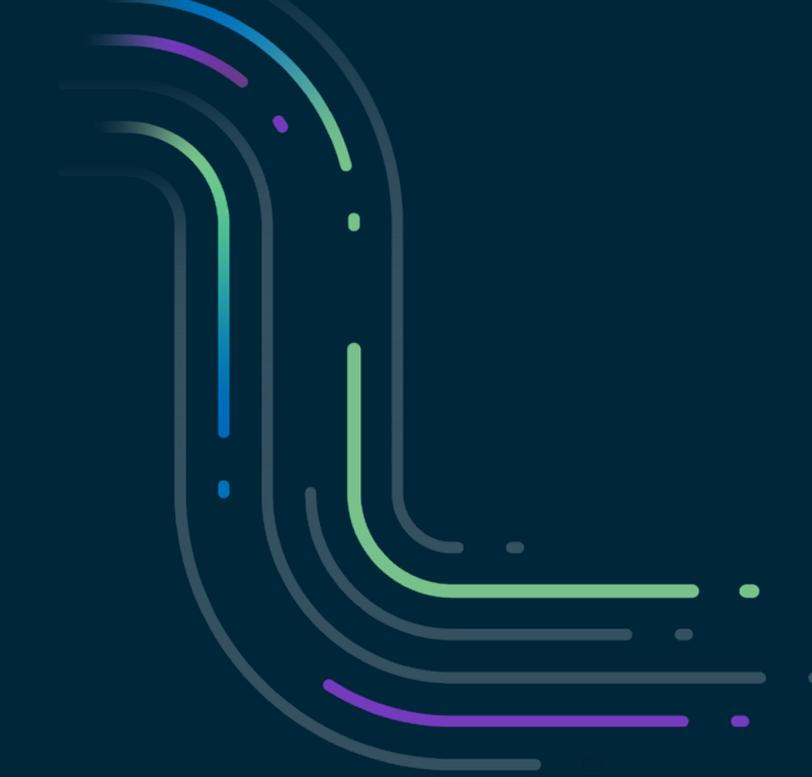
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umbrella platform  
where the marketing  
team can have control.



50%

growth in lead  
conversion in the  
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## About Total Expert

Total Expert is the leading fintech software company that delivers purpose-built CRM and customer engagement for modern financial institutions. Total Expert 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.



