

# A MARKETING AGENCY



Corporate  
PRICING AND SERVICES

**DATE :**  
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## Summary of Services

*a marketing agency, LLC (AMA), ensures the complete utilization of Total Expert's marketing capabilities to all end users. Our service packages include Implementation Management for Marketing, Post-Implementation Training Series for End Users, Long-Term Marketing Admin, Content Creation, Marketing Consulting, and Value Add-Ons for Loan Officers.*

### Overview:

At AMA, we aim to redefine mortgage marketing, delivering innovative and tailored solutions that empower corporate mortgage lenders to thrive in today's competitive landscape. We specialize in crafting dynamic strategies and comprehensive services designed to elevate your brand, engage your audience, and drive unparalleled results.

### Why Choose Us?

**Expertise:** With a team well-versed in the intricacies of the mortgage industry, we offer expertise that matters. We understand your challenges and provide solutions that align with your unique needs.

**Customization:** One size does not fit all in mortgage marketing. Our highly customized approach ensures that every strategy, campaign, and creative element is tailored to your specific goals and audience.

**Comprehensive Solutions:** From Implementation Management, Post-Implementation Training for End Users, Content Creation, Admin Services, Consulting, and Value Add-Ons for your LOs, we offer a full spectrum of services under one roof. This integrated approach streamlines your marketing efforts, ensuring consistency and effectiveness across all channels.

**Innovation:** The mortgage industry is ever-evolving, and so are we. We leverage the latest technologies, trends, and data-driven insights to keep your marketing strategies ahead of the curve. Our innovative solutions are designed to captivate your audience and leave a lasting impression.

**Proven Results:** Our track record speaks for itself. We have a history of helping Lenders and LOs achieve their marketing objectives, driving lead generation, enhancing brand visibility, and ultimately increasing revenue. Our success is measured by your success.

**Transparency:** We believe in clear communication and complete transparency. Our pricing is straightforward, and our process is open and collaborative. You'll always know what we're doing, why we're doing it, and how it benefits your business.

Discover the power of strategic mortgage marketing with AMA. We're here to be your partner in navigating the industry's complexities, connecting with your audience, and achieving unparalleled marketing success.

## Pricing Models:

### **Total Expert Implementation - Marketing Administration/Management:**

**Description of Services:** During the implementation of Total Expert, AMA will work closely with the Implementation team from Total Expert and the company Implementing the CRM. AMA works to bridge the gap between the two parties, conducting weekly meetings - outside of Total Expert's weekly meetings - to ensure the company implementing the CRM is progressing effectively. We accomplish this by guiding our clients through the implementation process with the "application use case" in mind, corresponding with Total Expert to ensure a smooth implementation, and completing all marketing-based implementation projects on our client's behalf (see services detailed below ). In short, if you are implementing Total Expert and need assistance with the marketing elements of the project - or you need a team familiar with this process that can manage implementation for your company - we are who you are looking for!

#### **For the price of \$5,500 per month, AMA will work with an institution to:**

- ❖ Attend all Total Expert training sessions for admins, including but not limited to webinars, virtual conferences, or live training sessions.
- ❖ Complete training tasks, homework, and supplementary assignments to assist with marketing development.
- ❖ Create collateral materials.
  - AMA will create as many pieces of content as possible during the implementation period while managing all other marketing elements of implementation.
- ❖ Create a living document of detailed notes from every meeting, training session, video, etc., during the Implementation of Total Expert. This document is usually around 100 pages.
- ❖ Attend workshops, training, reviews, and development with Client and Total Expert to get Client up and active with Total Expert.
- ❖ Create, review, and deploy marketing materials for print, email, and social media marketing.
- ❖ Develop the lender's marketing strategy for implementation and ongoing use.
- ❖ Provide general marketing assistance with various miscellaneous marketing projects during implementation to help ensure a successful implementation of Total Expert. (Project Management on behalf of the client)
- ❖ Assist with any relevant training to help end-users adopt the Total Expert CRM. (Pilot Group Training and General Group Training)

## **Post-Implementation Training Series for End Users:**

**Description of Services:** Following the implementation of Total Expert, if the end-users of the CRM need further training, AMA will host Zoom training sessions, going deep into the application of Total Expert. These training sessions are geared towards the long-term use and best practices of Total Expert. We will explain every essential element of Total Expert to LOs while fielding questions they have on how to use the platform effectively. Before the training sessions, we will connect with your Customer Success Manager at Total Expert to ensure all training sessions we conduct align with your platform's current buildout. We will also start this process by reviewing our meeting schedule and plans with your executive leadership, ensuring our goals and intentions for training align with your companies. We are flexible on the training topics, frequency, and approach. If there are topics you want us to discuss that are not listed below, please let us know, and we will accommodate.

**For the price of \$5,500 per month, AMA will host the following training sessions:**

### **Zoom Training Topics:**

- ❖ Overview of Total Expert
- ❖ Tasks, Contacts, and Emails
- ❖ Journeys
- ❖ Co-Marketing
- ❖ Social Media
- ❖ Print Marketing
- ❖ Lead Capture Apps
- ❖ Single Property Sites
- ❖ SMS and Video Marketing\*
- ❖ Q&A Session for all End Users

\* If applicable to your current Total Expert buildout.

Our goals during the training sessions are to:

- ❖ Educate end users about Total Expert in detail.
- ❖ Take a deep dive into what each resource is, how it works, and why it works to grow a LO business.
- ❖ Discuss best practices to ensure success when utilizing the resource.
- ❖ Provide examples of how to create/use the resource.
- ❖ Field any questions regarding the training topics.

***\*The completion timeline depends on the frequency of training sessions and how we split up LOs in these sessions.***

## Long-Term Marketing Admin:

**Description of Services:** Following the implementation of Total Expert, if your company needs long-term marketing management/administrator of the Total Expert CRM, AMA can serve as your outsourced, dedicated marketing team. AMA will serve as the Marketing Administrator for the Total Expert CRM on behalf of your company, working to manage and grow your marketing efforts. AMA will keep the system running smoothly, build new journeys, expand your print and social media content library, and assist end users with technical questions. AMA is the bridge between your organization and Total Expert, allowing streamlined communication and efficient operation of the CRM while actively communicating with your leadership team to ensure we meet your team's goals and objectives.

**For the price of \$2,500 per month, AMA will work with an institution to:**

- ❖ Serve as the Marketing Administrator for your company, managing the Total Expert CRM.
- ❖ Expand on the current Total Expert internal buildout, growing the system to a more robust platform with more content.
- ❖ Develop the lender's marketing strategy for the ongoing use of Total Expert.
- ❖ Ensure the smooth operation of Total Expert within your company's ecosystem.
- ❖ Serve as the middleman between Total Expert's Customer Success Manager and your team.
- ❖ Assist end users with technical issues or questions regarding the Total Expert CRM.
- ❖ Host regular training sessions for end users on the Total Expert platform.
  - Provide supplemental training resources for end users.
- ❖ Manage corporate social media accounts (Facebook, Twitter, LinkedIn) through Total Expert.
- ❖ Provide general marketing assistance with various marketing projects during the long-term use of Total Expert.

**\*These services do not include any content creation that AMA will publish into the Total Expert CRM. We strongly recommend choosing one of our Content Creation Packages to supplement the Admin Services to ensure ample content is available to your LOs.**

## Content Creation:

**Description of Services:** AMA specializes in creating custom social media content and print collateral for the Total Expert CRM. AMA can supplement your content library with unique educational content tailored to your company. We focus on educating your audience about the mortgage process, helping borrowers understand the process of working with a LO, terminology, and important information surrounding mortgages and the loan process. Our content aims to establish your LOs as thought leaders, and we ensure compliance by collaborating with your team before any content is published. AMA's only goal with the Content Creation model is to provide new, unique content every month. AMA offers three tiers of content creation: Bronze, Silver, and Gold. Each level provides different quantities of content delivered each month.

### **Bronze Tier: For the price of \$625 per month, AMA will work with an institution to:**

- ❖ Create **ten** unique pieces of content per month.
- ❖ Create matching stories for the posts on social media.
- ❖ Create custom story icons to display on your social media profile.
- ❖ Provide our custom social media strategy for posting cadence.
- ❖ Correspond with your compliance team to ensure all content is compliant with regulations.
  - Make any needed edits to the content to ensure compliance before publishing in Total Expert.

### **Silver Tier: For the price of \$1,250 per month, AMA will work with an institution to:**

- ❖ Create **20** unique pieces of content per month.
- ❖ Create matching stories for the posts on social media.
- ❖ Create custom story icons to display on your social media profile.
- ❖ Provide our custom social media strategy for posting cadence.
- ❖ Correspond with your compliance team to ensure all content is compliant with regulations.
  - Make any needed edits to the content to ensure compliance before publishing in Total Expert.

### **Gold Tier: For the price of \$2,500 per month, AMA will work with an institution to:**

- ❖ Create **40** unique pieces of content per month.
- ❖ Create matching stories for the posts on social media.
- ❖ Create custom story icons to display on your social media profile.
- ❖ Provide our custom social media strategy for posting cadence.
- ❖ Correspond with your compliance team to ensure all content is compliant with regulations.
  - Make any needed edits to the content to ensure compliance before publishing in Total Expert.

***\*Content Creation is not included in the Monthly Marketing Admin Services. We recommend choosing one of the three tiers above in addition to the Marketing Admin Services to ensure continuous content is released into your Total Expert CRM.***

## Marketing Consulting:

**Description of Services:** AMA offers specialized Marketing Consulting Services meticulously crafted to empower corporate mortgage lenders with strategic insights, innovative methodologies, and an in-depth understanding of the ever-evolving mortgage marketing landscape. We commit to ensuring your marketing efforts meet industry standards and surpass them, providing your organization with a definitive competitive edge in the corporate mortgage lending arena. AMA's consulting methodology transcends traditional recommendations. We deeply engage with your organization to foster a comprehensive understanding of the marketing landscape, arming your institution with the tools, knowledge, and practical steps essential for excellence. We work collaboratively with your team, seamlessly integrating best practices and proven methodologies into your existing framework.

Our consulting services are meticulously tailored to your unique requirements, ensuring that you receive solutions that are not only relevant but exceptionally effective. Your journey with us is marked by a commitment to excellence in marketing consulting for corporate mortgage lenders, positioning your institution to thrive in this dynamic and fiercely competitive industry.

**For the price of \$2,000 per month, AMA will work with an institution to:**

- ❖ Industry Analysis and Insights
  - Thorough Industry Landscape Examination
  - In-Depth Market Insights
- ❖ Performance Evaluation and Management
  - Performance Review and Tracking
- ❖ Strategic Planning Services
  - Strategic Planning
  - Collaborative Strategy Formulation
  - Tech Review for Strategy Enhancement
  - Comprehensive Internal Resource Assessment
- ❖ Operational Assessment and Guidance
  - Operations Review
  - Customized Marketing Roadmaps
  - Roadmap Implementation Support
  - Roadmap Review and Optimization
- ❖ Training and Knowledge Sharing
  - Training and Knowledge Transfer
  - Ongoing Training and Strategy Sessions
- ❖ Performance Monitoring and Support
  - Ongoing Performance Tracking
  - Strategy and Review Calls for Continuous Improvement:

**Are you seeking premium marketing resources for Loan Officers at your company? Inquire about our exclusive Value Add-On Services. These offerings are crafted to equip your Loan Officers with unique marketing resources while attracting high-performing Loan Officers to join your organization. If this piques your interest, let's start a conversation!**