



CASE STUDY

**Atlantic Bay
Mortgage Group's
New CRM Achieves
86% Email Open Rate
and 92% Internal
Adoption Rate**



TotalExpert



Atlantic Bay
Mortgage Group

The Situation

Loan officers at Atlantic Bay Mortgage Group were spending too much time on administrative tasks, such as composing and sending manual emails, instead of focusing their time on customer relationships. The glaring inefficiencies spurred leaders into action, prompting a shift away from legacy technologies to a purpose-built future.

Atlantic Bay sought a single system, providing their loan officers with intuitive and automated email marketing and digital marketing capabilities. But this system also needed to allow loan officers to easily order and ship printed marketing materials on-demand. And it had to be best-in-class (i.e., technology fine-tuned to the specific business and compliance requirements of the financial services industry).

The Solution

After scrutinizing a variety of technology and partner options, Atlantic Bay's leaders found their answer in Total Expert. By seamlessly integrating Total Expert with their broadened technology ecosystem, including the loan origination system and pricing engine, Atlantic Bay unlocked a world of potential.

Total Expert's automation now liberates loan officers from mundane administrative tasks, allowing them to focus on delivering exceptional and meaningful experiences to clients. In a single, all-encompassing system, loan officers can set up automated email campaigns and Journeys, manage their print collateral orders, keep borrowers informed about their loan progress, and rest assured that their communications meet stringent compliance standards.

In addition to external interactions, an internal onboarding Journey guides new loan officers through vital, on-demand training, encompassing marketing budget instructions, personal websites, technology setup, database management, contact outreach, and best practices for utilizing Total Expert.



“When you work with companies like Total Expert that are in the same industry as you, they understand your challenges, they understand your pain points, and they celebrate wins with you that other folks outside the industry really don’t understand. When you have that relatability — and a trusted partner — it really can go a long way.”

Jessica Swink

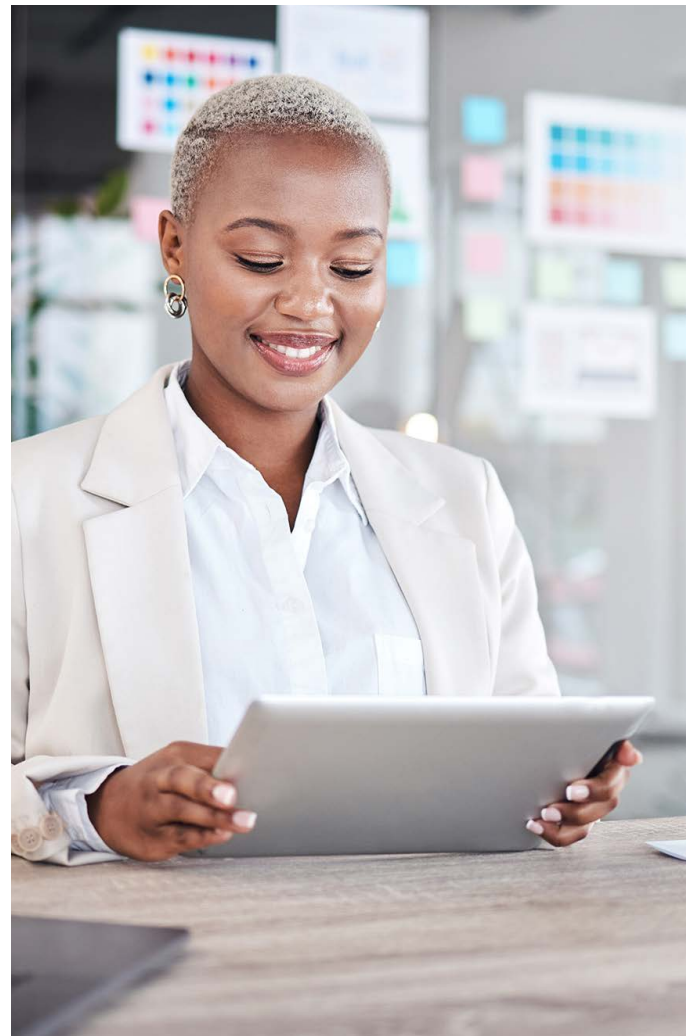
Vice President of Digital and Brand Experience

The Success

A whopping 92% of loan officers at Atlantic Bay Mortgage Group use Total Expert to automate their customer communications and engagement, with half logging in to the system more than 12 times each and every day.

Atlantic Bay’s marketing team benefits from Total Expert, too. They now save an average of three hours per new hire—which equated to more than 90 hours of time saved in Q1 2023 alone thanks to the internal onboarding Journey that boasts an open rate of 75%.

But what makes marketing leaders most proud is the 86% email open rate their Total Expert-powered Journey emails achieve with prospects and customers. Beyond simply confirming the marketing emails Atlantic Bay loan officers now are timely and relevant, the exceptionally high open rate also indicates readers find the emails engaging and interesting.





About Total Expert

Total Expert is the purpose-built customer engagement platform trusted by more than 200 financial enterprises. The platform 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 to increase loyalty and drive growth for banks, lenders, credit unions, and insurance companies, and is now available to purchase through the AWS Marketplace and Salesforce AppExchange. For more information, visit totalexpert.com.