



CASE STUDY

Midwest BankCentre Chooses Total Expert to Deliver a Streamlined Experience and Drive Revenue





The Challenge

St. Louis' premier community bank since 1906, Midwest BankCentre operates 17 bank locations within the St. Louis and Metro East area and is the region's second largest locally owned bank.

Bank leaders take great pride in the customer-centric, value-based, and digital-first approach Midwest BankCentre works hard to maintain. So, in 2022, when an antiquated CRM system wasn't meeting client, marketing, or loan officer needs, they knew the time had come to modernize the bank's sales and marketing tech stack.

"We were looking for a more robust solution, one that would help us deliver a more streamlined, seamless home loan experience for both end consumers and loan officers by reaching the right customer with the right message, at the right time," says Senior Vice President of Mortgage and Loan Services Rebecca Walker.



Why Total Expert

After evaluating several potential solutions and platforms, Rebecca selected Total Expert as Midwest BankCentre's new CRM for their mortgage department.

"Total Expert offers a competitive solution at a competitive price point, while continuing to innovate," Rebecca explains. "We're confident the Total Expert platform will help our loan officers stay in front of and more easily help each client find their best home loan solution."



Solution to Date

Midwest BankCentre is currently implementing and integrating Total Expert with its Encompass loan origination system. This integration will allow them to deploy marketing automation and customer engagement based on loan updates from Encompass.

“I firmly believe Total Expert will give us an opportunity to increase our originations.”

Rebecca Walker,
Senior Vice President of Mortgage and Loan Services

Results to Date

While still in the implementation phase, Rebecca is confident Total Expert will help Midwest BankCentre double down on its three strategic pillars – customer-centricity, value-based and digital-first.

“I firmly believe Total Expert will give us an opportunity to increase our originations,” Rebecca predicts.





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.