



CASE STUDY

How NFM Lending Enhanced Customer Engagement with Total Expert



The situation

NFM Lending, a leading institution in the mortgage industry, faced significant challenges with their previous CRM and customer engagement capabilities. Before partnering with Total Expert, they relied on Surefire and other disconnected systems that created inefficiencies in their loan officers' workflows which limited their ability to:

- Effectively manage and route leads
- Deliver consistent customer engagement at scale
- Leverage data insights to drive business opportunities
- Support their sales team with a mobile-friendly solution



The solution

NFM Lending chose Total Expert as their comprehensive, enterprise CRM and customer engagement platform to remove the silos between their LOs, marketing teams, and leadership. Beyond streamlining their tech stack and helping them reduce their overall spend on technology, implementing Total Expert has already helped NFM Lending:

- **Unite their customer engagement:** They now have a single, integrated system that streamlines daily workflows and operations by eliminating the need for multiple fragmented and redundant solutions
- **Tap into new data insights:** Total Expert Customer Intelligence replaced their previous Sales Boomerang solution and helped uncover hidden opportunities in their database
- **Launch robust co-marketing programs:** Dedicated tools allow loan officers to build and nurture relationships with real estate partners to help drive more referrals.
- **Pre-built integrations:** Tools like BombBomb and Adwerx simplify video messaging and advertising efforts without requiring loan originators to juggle multiple platforms—everything is integrated within Total Expert.
- **Stay connected on the go:** The Total Expert mobile app allows LOs to receive alerts and engage customers from anywhere, anytime.



“The Total Expert team is incredibly responsive and forward thinking. The biggest improvement we’ve seen with our partnership has been on things like integrating with various platforms, better contact routing through automation, and lead management development.”

Greg Sher
NFM Lending Managing Director

The results

Within just six months of using Total Expert, NFM Lending has already seen significant impact on their business:

Increased Platform Engagement:

- **3.4 million emails** sent through the system
- **2,300 print/PDF materials** utilized
- **120 social media templates** created
- **250+ active journeys launched** providing customized contact experiences

Enhanced Data Insights

- **Consistent pricing** from replacing per-alert pricing model with built-in Customer Intelligence
- **19,950 Insights** triggered in just six months
- **3,526 automated follow-ups** sent with a **54% open rate**
- **301 loans created** and **106 loans funded** directly from Customer Intelligence alerts
- **\$37M in funded loan volume** attributed to Total Expert Customer Intelligence

Strengthened Partner Relationships:

- **1,117 agent connections** accepted into the new co-marketing partner portal
- Improved collaboration capabilities between loan officers and real estate agents

Mobile Capabilities

- Improved access through the Total Expert mobile app
- Critical ability for loan officers to respond immediately to customer inquiries

Strategic Value

- Custom solutions for different business needs
- Prevented teams from seeking independent, disconnected solutions
- Established foundation for continued growth and optimization



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Looking Ahead

“We’re only just starting to hit our stride with Total Expert. As we continue to build, test, and refine things beyond the foundational pieces, the value and the impact that we can deliver for both our sales teams and our customers will be incredible.”

Laura Clapper
NFM Lending Chief Marketing Officer

As NFM Lending continues to deepen their use of Total Expert, they anticipate further gains in efficiency, customer engagement, and revenue generation. The initial six months have been focused on implementation and establishing a strong foundation. NFM Lending is positioned to leverage more advanced capabilities to drive even greater business results.



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.