

# Purpose-Built CRM + Customer Engagement Platform for Modern Banks

*Personalize every touchpoint at scale with an end-to-end experience platform*

## Combine the power of sales and marketing in a single platform

The Total Experience Platform gives relationship managers and marketers the digital tools they need—from sales and marketing, to data analytics and compliance—to deliver personalized interactions and experiences that build trust, deepen loyalty, and create lifelong relationships.

**Understand Your Customers** – Connect data from multiple systems, including your core, to get a holistic, 360-degree customer view in a single platform. Turn rich customer data into intelligent insights on how you can deliver relevant value today—and help them achieve their dreams tomorrow.

**Automate Personalized Experiences** – Break down silos and align your customer engagement strategy with highly integrated CRM and marketing automation to orchestrate stand-out omnichannel experiences.

**Empower Your Team** – Leverage built-in automation and prioritized task management to make your customer-facing team more productive—freeing your people to focus on growth strategies, lead nurturing, and customer retention.

**“The Total Expert platform will give our team access to valuable customer insights across our organization, and enable them to deliver an above-and-beyond, personalized customer experience.”**

**Fred C. Schwertfeger, SVP, Chief Strategy Officer, Horicon Bank**

The Total Experience Platform was built from the ground up to meet the specific needs, goals, and requirements of financial institutions.



**Onboarding Programs** – Financial institutions have the most success onboarding new customers during the first 90 days of the relationship. With ready-made, industry-tailored Journeys and activity triggers, financial institutions can quickly set up effective onboarding experiences, reengage customers who didn't finish the process, and prioritize high-value conversations with banking staff. Since onboarding is one of the single best opportunities to win a customer for life, this Total Expert functionality is key to drive the omnichannel experience that keeps them coming back.



**Next Recommended Product or Service** – Total Expert's retail banking CRM makes it easy to leverage behavioral, transactional, and motivational data to successfully segment and connect your customers with the products and services they need for their unique financial situation.



**Ongoing Member Retention** – Turn consumers into customers for life with ongoing nurture programs and automated messaging that engages customers near the end of their loan, the term of their CD, or at key life moments overlapping with banking product usage. Tying your services to customers' needs drives email opens and engagement; it also wins the long-term game: building relationships of trust and loyalty lasting a lifetime.

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