

Total Expert Brand Messaging Strategy

PRESENTED BY:

HIFI

Table of Contents

Background	3
Messaging Strategy	4
Messaging Threads	8
Brand Messaging Tone	10

Audiences that Total Expert already serves

Banks

Credit Unions

Brokerage Firms

Mortgage Brokers

Platform users:

- Loan Officers
- Mortgage Brokers
- Realtor Partners
- Marketing Managers

New target audiences for Total Expert

Wholesale Lenders

Platform users:

- Loan Officers
- Mortgage Brokers
- Realtor Partners
- Marketing Managers
- Account Supervisors
- Talent Managers

What is it?

- It focuses an organization, and differentiates it from others

- It can have a profound, transformative effect on everything the organization does, and how it does it

- Contains powerful, evocative language

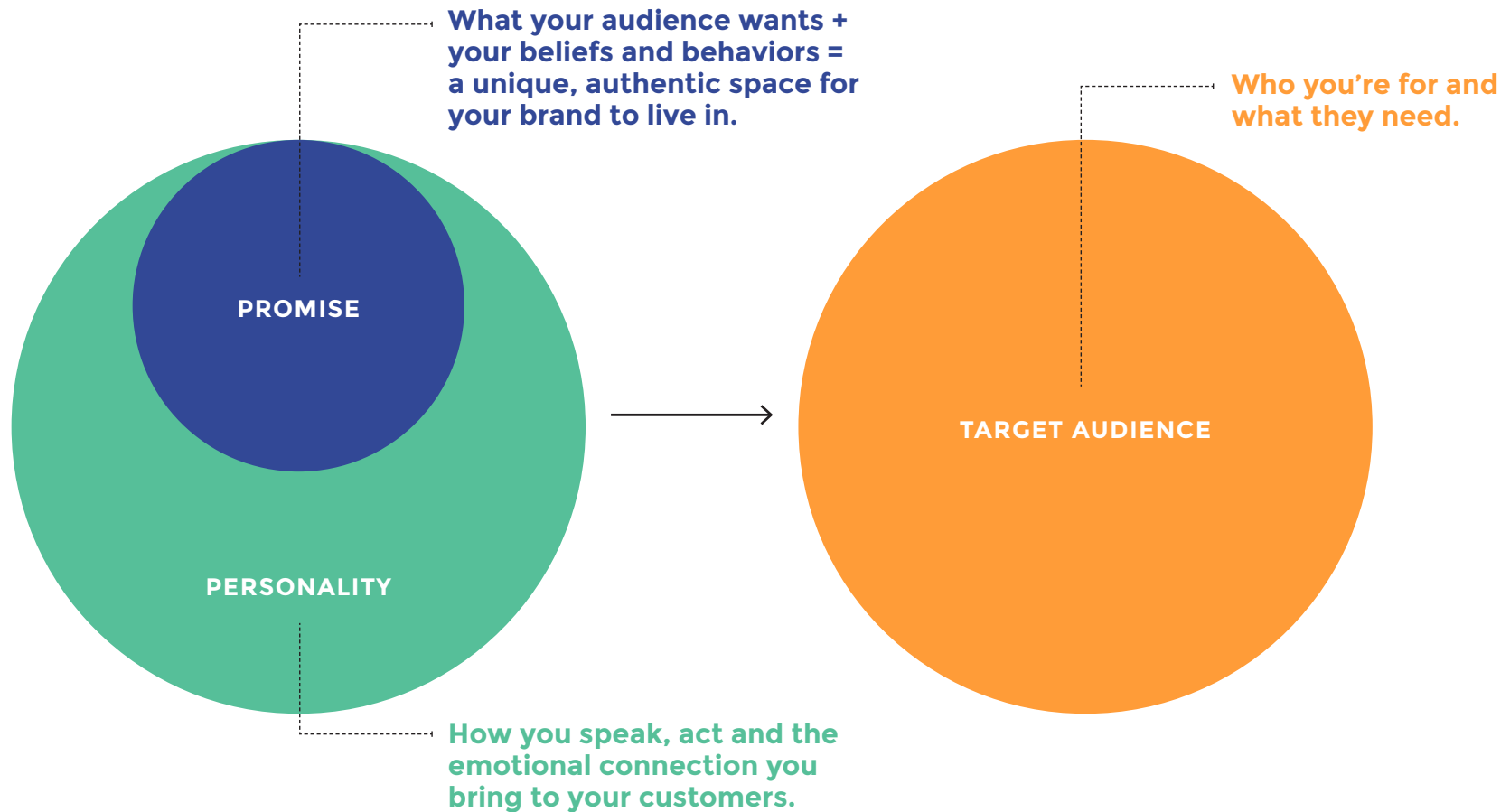
- True to both the realities and aspirations of Total Expert

- Broad enough to last for the long term – things around it may change, but the positioning should remain steadfast

- Broad enough to encompass a range of campaigns

- Internally and externally inspirational

Structure



For (TARGET AUDIENCE), Total Expert will (PROMISE + PERSONALITY).

TARGET AUDIENCE

For high-ambition mortgage companies
with high-expectation customers,
Total Expert makes delivering a superior
customer experience easier
for everyone on your team.

PROMISE

PERSONALITY

Who We Are: (Brand)

We're a finance and technology hybrid that builds connected and empowered mortgage teams.

What We Do: (Offering)

Through our enterprise-ready sales and marketing platform, we help mortgage companies and their partners establish a unified strategy for customer engagement, orchestrate best-in-class consumer experiences across multiple platforms and own customers for life.

How We Do It: (Approach)

Our approach not only drives sales, but also gives mortgage brands the ability to own the relationship with their customers and partners, the simplicity to automate time-consuming and repetitive tasks, and the flexibility to meet customers' in-the-moment needs with holistic, real-time data and unique marketing messages.

It's time to rethink digital mortgage experiences from the customer up.

As natives of the mortgage industry, we're well-versed in the magical qualities of exceptional loan officers and their teams. We know customers lean on them and their expertise to make sense of mortgages – and a whole lot more.

Inherently innovative, we looked around at available technologies and wondered why existing mortgage sales and marketing platforms didn't do much to foster those real (and really important) relationships.

And, so we made are own. One that gets to know your prospects and your customers deeply, uses insights to provide personal journeys and positive engagements, and supports a culture of relationships that helps your whole team succeed.

1 We're bringing humanity into complicated financial transactions.

How? By leveraging your two most important assets – your customers and your team.

2 In a big world, relationships still matter.

Build your brand, connect with your people and capture customers for life.

3 Lead with customers.

The mortgage platform that's best for a best-in-class customer experience.

4 The future of the mortgage industry is here, and it's hinged on customer experience.

Total Expert helps you act on consumers' ever-increasing expectations for communication, speed, service and convenience.

5 A home mortgage is the biggest financial transaction of most people's lives.

If you're not delivering on experience here, then you're not delivering anywhere.

6 Any CRM can help you get things done.

Our CRM helps you transition and transform into a customer-led company.

7 Hi, we're Total Expert. The customer company.

Our experts and engineers have spent years studying mortgage customers and creating a platform based on real customer needs. The result? The most innovative and integrated technology system in the industry – and the only one focused on customer experience first.

Our brand voice is...

We aim to strike an informed, friendly, and accessible tone in all of our content.

Intelligent

When we communicate with each other, with clients or partners, we should always be thoughtful, informed and considerate — both of the specific audience and of their time.

Real

Authenticity is crucial to our storytelling approach. When we use our point of view to reveal truths and insights about Total Expert and the impact of our technology on the industry, we can build engagement with our audience.

Ambitious

At Total Expert, we are all determined. We dream big, we set staggering goals, and once those are met we set the next ones even higher. Our messaging should reflect this dogged nature.

Modern

We are committed to exploring new modes of communication — this includes new mediums, imaginative visual treatments and crisp language.

Holistic

Our communications represent our clients, who in turn represent many communities, cultures and backgrounds. The quality of our clients' and their customers' experience is heavily connected to our tone.

Clever

We're quick thinking, nimble and flexible, and the seriousness of our pursuits doesn't preclude an appreciation of wit and craft.

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