

Total Expert Mortgage Competitive Brand Analysis

PRESENTED BY:

HIFI

About This Report

The information in this report examines key themes that define the digital brand experience of Total Expert and its competitors through the lens of brand archetype, brand personality and brand messaging. Audit data and insights were sourced from brands' websites, social platforms and Google Analytics.

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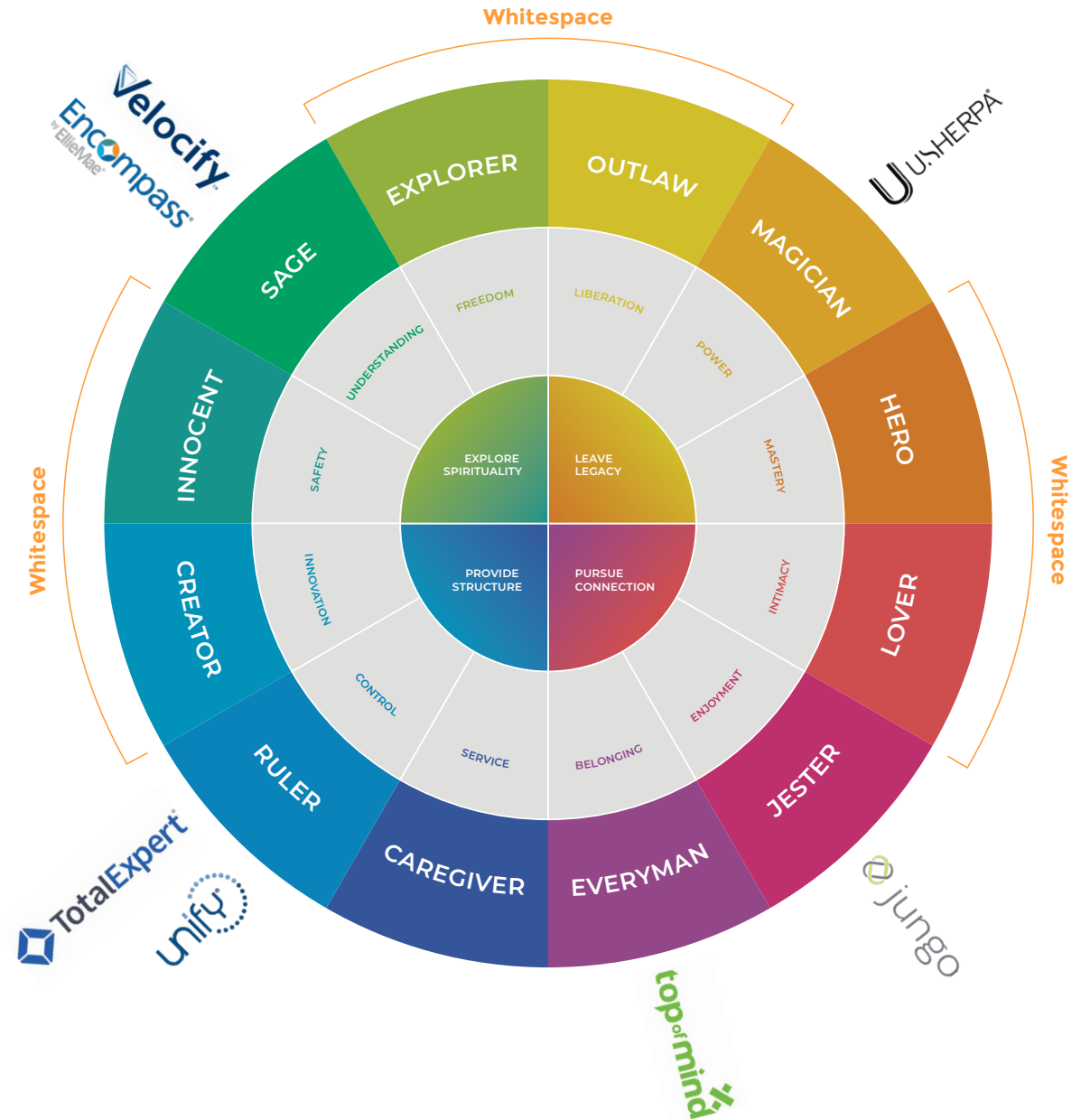
Brand Comparison

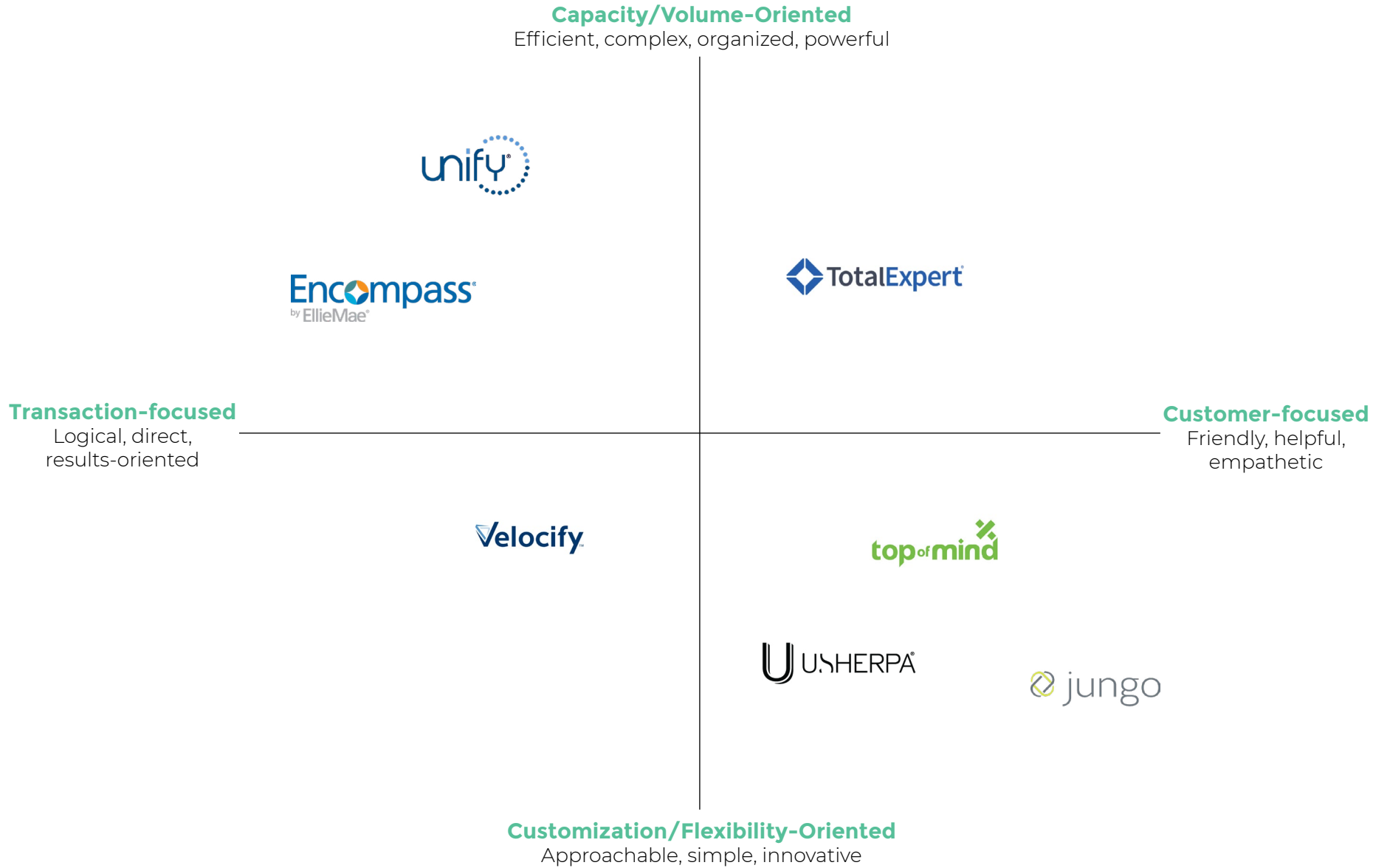









vs










Brand archetypes help identify whitespace





							
Archetype	Ruler	The Everyman	Sage	Sage	Ruler	The Magician	Jester
Attributes & Values	Business savvy, helpful, partner, journey-driven, well-designed user materials	Leadership, innovation, relationship longevity, trust	Efficacy, speed, productivity, high capacity, quality, service	Practical, money-saving, volume- and results-oriented, quality, flexible, comprehensive, powerful, user-friendly	Trust, convenience, empowerment, problem-solver, comprehensive	Caring, success-driven, experienced, relationship-focused, unique features, results-oriented, low-stress, seamless, integrity, fun	Holistic, visionary, simplification, time-saving, empowerment, innovative, integrated, connectedness, quality of life, people-oriented
Personality	Logical, productive, driven, reliable, visionary, thought leader	Smart, helpful, forward-thinking	Capable, straightforward, tech- and product-focused, unpretentious; under the brand umbrella of Ellie Mae	Direct, no fluff, assured, understanding, attuned	Go-getter (aimed at top mortgage lenders), competitive, helpful, approachable, aspirational	Friendly, helpful, energetic, empathetic, loyal, easy, reliable, simple, resonant, passionate	Powerful, leading-edge, modern, hip, cheerful, fun-loving
Weakness	Occasional customer complaints about slow speed Reporting, marketing automation	Relative cost and minimal features diminish appeal for smaller branches, teams or individuals	Must be used in conjunction with Salesforce to enable optimum reporting capability Little brand personality outside of positioning as an Ellie Mae solution	Would benefit from additional support features such as a workflow best practices guide and additional training aimed at small lenders Software loads slowly Little brand personality outside of positioning as an Ellie Mae solution	Uneven user experience Can be difficult to navigate without support Can be glitchy	Limited integration with certain other sales software products can result in a clunky user experience	Can be challenging to learn Requires considerable customization upfront Limited to use with Salesforce
Score (how strongly the brand comes through)	C	B	B-	B-	C	B	A

Twitter	@TotalExpertInc 1,360 followers Posts many times/day	@mortgagecrm 609 followers Posts 5x/week	N/A	@EllieMaeInc 4,150 followers Posts 1-2x/day	@crm_unify 732 followers Posts 3-4x/week	@UsherpaCRM 244 followers Posts 2-3/week	@JungoInc 1,216 followers Posts 2-3x/week
LinkedIn	Page Link 7,706 followers Posts 2x/day	Page Link 1,943 followers	Page Link 3,982 followers Inactive for 2 years	Page Link 22,882 followers	Page Link 274 followers Posts 2x/week	Page Link 231 followers Posts 2x/week	Page Link 1,582 followers Posts 2-3x/week
Facebook	Page Link 2,405 followers Posts 2x/day	Page Link 7,049 followers Posts 1x/day	Page Link 2,980 followers Inactive since 2017	Page Link 2,286 followers Post 1-2x/day	Page Link 216 followers Post 3-4x/month	Page Link 390 followers Posts 2x/week	Page Link 1,479 followers Posts 2-3x/week
YouTube	Page Link 400 subscribers Inactive for 5 months	Page Link 127 subscribers Recently posted several videos but was inactive for about a year	Page Link 267 subscribers Inactive for 2 years	Page Link 531 subscribers Post ~ 1x/month	Page Link 1 subscriber Difficult to tell if this is an official account. 1 video posted 1 year ago	Page Link 8 subscribers Inactive for 3 years	Page Link 223 subscribers Inactive for 1 year
Instagram	N/A	Page Link 141 followers Posts 1x/day	Page Link 191 followers Inactive since 2017	N/A	N/A	N/A	Page Link 1,841 followers Posts 2-3x/week
Content Types	Live tweets during industry conference Welcoming new partners Light-hearted/approachable videos Sharing article and blogs from industry partners Podcast episodes positioning Total Expert as thought leaders	Market updates Reminders about live product demos Recording of annual SureFire Summit Product demo videos Marketing advice	Not active	Virtual expo announcement Helpful product feature announcements Blog post updates Market updates Helpful tips Customer video testimonials	Market updates Blog posts with thought-leadership type content Customer testimonials	Blog posts with thought-leadership type content User testimonials	Customer testimonials Reminders to send out holiday emails Product update reminders Marketing tips Blog posts with thought-leadership type content Market updates

							
Repeated Themes	<p>New partnership announcements</p> <p>Building trust with clients and consumers</p> <p>Treat your customer like someone you already know</p>	<p>Product feature updates</p> <p>Housing market and economic updates</p> <p>SureFire CRM users stay #topofmind</p>	Not active	<p>Mortgage market updates</p> <p>Webinar announcements</p> <p>Product announcements</p>	<p>Work Smart. Manage Better. Sell More.</p> <p>UNIFY is a mobile CRM</p>	<p>The future of CRM is relationship engagement</p> <p>Personalization is the key to 10x sales growth</p> <p>Usherpa knows what easy looks like, Close more deals with less effort</p>	<p>Mortgage CRM built on the Salesforce platform</p> <p>Innovate. Connect. Grow.</p> <p>Educate your customers</p>
Calls To Action	<p>Listen to our podcast, read our blog</p> <p>We're hiring, join our team</p>	<p>Join us for a product demo</p> <p>Learn more on our website</p> <p>Learn more about our new features</p>	Not active	<p>Register for our webinar</p> <p>Learn more on our website</p>	<p>Attend our virtual tradeshow and training event</p> <p>Visit our website to learn more</p> <p>Schedule a demo</p>	<p>Schedule a demo</p> <p>Check out our blog</p>	<p>Read our latest blog post</p> <p>Reach out to our sales team to learn more</p> <p>Visit our website to learn more</p>
Notes	<p>Tone is upbeat, positive and conversational</p> <p>Showing the human side of the fintech industry</p>	<p>Emphasis on the ever-evolving product</p> <p>Encourages audience to watch a product demos</p> <p>Informational tone</p>	<p>The Velocify channels have been inactive since 2017</p> <p>Before going dormant, the tone of the social channels was informal, with many pictures of staff</p>	<p>Velocify and Encompass do not have their own social media identities</p> <p>They fall under the umbrella of Ellie Mae</p> <p>Informational posts</p>	<p>Unify emphasizes that it is a Mobile CRM</p> <p>Clients can easily use the CRM on any device</p> <p>Tone is informative and casual</p>	<p>Emphasis on the need to communicate "authentically"</p> <p>Usherpa makes it easy to close more deals with less effort</p> <p>Target audience is loan officers as well as realtors</p>	<p>Tone is conversational</p> <p>Emphasis on educating clients with market updates</p>

Total Expert

Total Expert
3d · 🌐

Day 1 of #DigMortgage20 is a wrap, and we are walking away with so many thoughts about the important relationship between the capabilities of your technology and the quality of your human interactions.

Some key quotes from the day:

"If you think about mortgage in a modern sense, we are manufacturers: instead of putting tires on a car, we are piecing together a loan, and much like modern manufacturing practices, technology enables scalability." – Keynote given by Bob Walters o...
See More

DIGITAL MORTGAGE CONFERENCE
#DigMortgage20
TotalExpert DIGITAL MORTGAGE

Top of Mind

70% of people are more likely to remember direct mail marketing vs. digital

topofmindnetworks · Follow

topofmindnetworks Think direct mail is yesterday's news? Think again. Physical ads evoke a stronger emotional response and therefore stick around longer in consumers' memories. Forget what you know about direct mail and read our ebook by clicking on the link in our bio to find our research paper!

to
topofmindnetworks
#mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising #mortgageadvertising

👍 2
🗨️ 0
📌 0
🔖 0

🕒 8:56
AUGUST 21
Add a comment... 100%

www.topofmind.com top-of-mind

Velocity

Velocity
September 22, 2017 · 🌐

3 ways to stay engaged with borrowers during a longer #purchase cycle using #email #marketing:

VELOCITY.COM
Stay Engaged with Borrowers Using Email Marketing | Blog | Velocity

Encompass

Ellie Mae
September 7 · 🌐

According to the latest Ellie Mae Millennial Tracker, Millennial purchase activity continued to rise in July (61%) despite tight housing inventory; meanwhile, the average interest rate for all loans closed by this cohort fell to 3.25%, the lowest it's been since Ellie Mae began tracking this data. Read the full report here: <https://ellie.me/July2020EMMT>

EllieMae Millennial Tracker
TRACK YOUR APPLICATION THROUGH THE U.S. MARKET-TO-BUSINESS

5 2 Shares

Unify

Unify CRM @crm_unify · Jun 25

Engage your clients with Video Marketing. Personalization is the key to developing great relationships. Record right from your PC or mobile device with the UNIFY True Mobile CRM. Work Smart. Manage Better. Sell More. Schedule a quick Demo today. #CRM #mortgage

MARKETING FEELING STALE?
VIDEO MARKETING
CAN FRESHEN UP AND PERSONALIZE YOUR MARKETING

unify

Usherpa

Usherpa
231 followers
2w · 🌐

Never stress for your success! Usherpa's intuitive CRM presents opportunities in an easy-to-use format that gives you everything you need to stay on your client's radar, generate referrals, and grow your business. Discover how today! <https://lnkd.in/ervRrkt>

DAVID ATTRIBUTES 38 LOANS A YEAR TO USHERPA

“

I took a look at my last year's production numbers and I attribute 38 loans to Usherpa. Thank you guys and keep up the excellent work!

- David J. | Washington, D.C.

Usherpa - Schedule a Demo - Usherpa.com
usherpa.com · 1 min read

👍 1

Jungo

Jungo
@jungo 1,582 followers
1mo · 🌐

It is critical that your customers understand just how powerful a loan estimate is. After all, it contains and shares the most important information about their loan with you. Our recent blog post addresses how to (easily!) edu. ...see more

The Mortgage Update: Help Your Clients Understand Their Loan Estimate
jungo.com

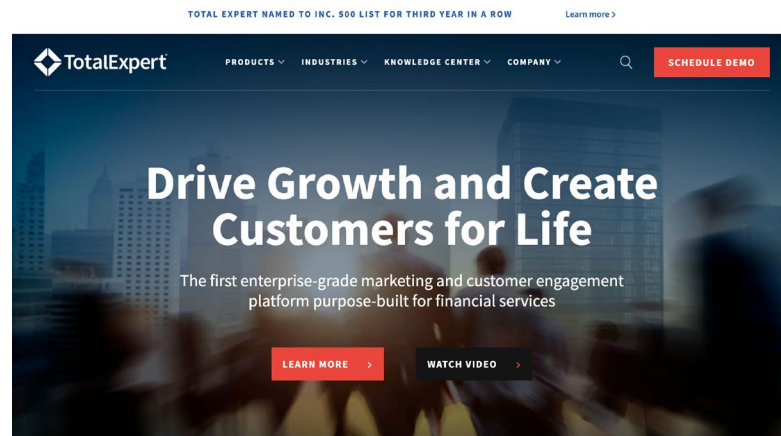
Website Imagery & Messaging

Total Expert

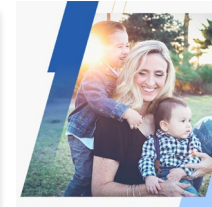
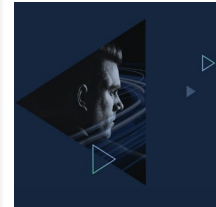
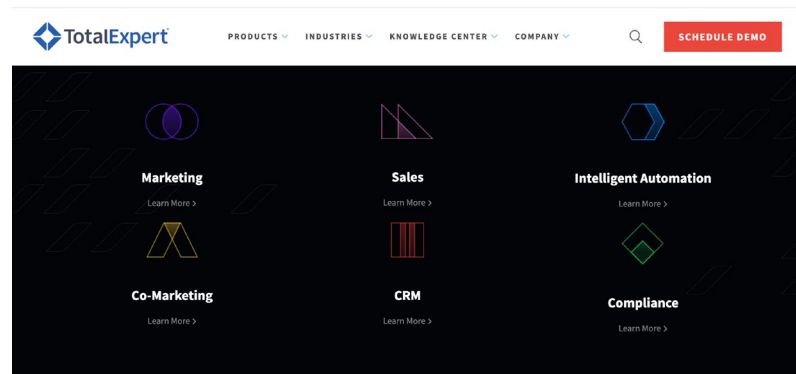
<https://totalexpert.com/>

Look: power/prestige/techy

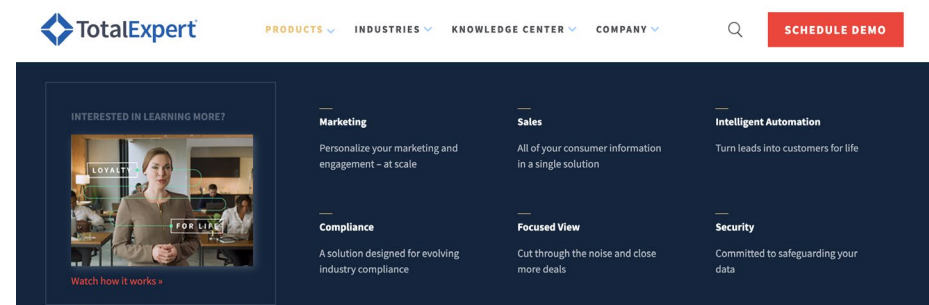
HOME HERO



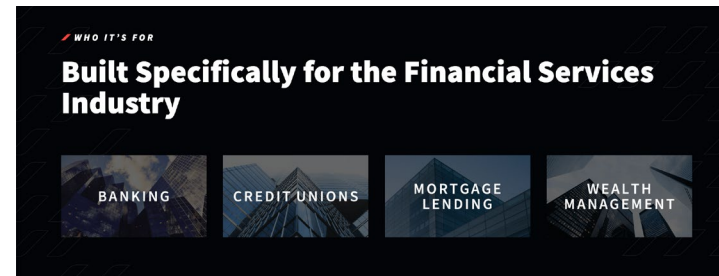
FEATURES



PRODUCTS



CUSTOMERS



Perceived Positioning

VISIONARY BIG PICTURE PLAYER - Provides the only product built specifically for the financial industry, and promises growth and customer engagement for life

What They Say

TAGLINE - Move Fast / Innovate

PROMISE - Your foundation for modern sales and marketing

PURPOSE - Humanizing complex financial transactions

MISSION - Drive growth by making relationships human again

DO - Total Expert powers marketing and customer engagement for the nation's top financial brands

Brand Architecture

Master brand without product sub-brands

Archetype

RULER - Possesses a high degree of confidence and has an innate desire to be the leader. Seeks to prevent chaos for customers by taking control.

What This Means For Total Expert

Total Expert looks techy and modern, but you have to sort through a lot of messaging to figure out exactly what the company delivers. Problem-solving language is useful, but brand and value proposition are not clear. You get a sense the company has accomplished a good amount for mortgage companies, but can't easily find the thread into other financial areas within the marketing at this time.

Claims

Trusted by industry leaders

The first enterprise-grade marketing and customer engagement platform purpose-built for financial services

The future of mortgage lending

Offers

Break down data silos to offer a clear view of your customers so you can put them at the center of everything you do

Empower your loan officers to build relationships that turn customers into customers for life

Level up your financial brand

Top of Mind

<https://www.topofmind.com/>

Look: warm/friendly/accessible



HOME HERO

top of mind Surefire CRM Solutions Our Features Resources Company Login [Request a Demo](#)

Surefire CRM

The #1 Most-Used CRM in the Industry

Top of Mind designed Surefire CRM to empower lenders to close more loans with too your organization.

SOLUTIONS

- Marketing**
Win with a massive award-winning content library
[More Info](#)
- Sales**
Manage your inbound leads and track your pipeline
[More Info](#)
- Executive**
Access high level reporting to ensure goals are being met
[More Info](#)
- Compliance**
Track & audit every piece of content your LO team sends out
[More Info](#)
- Technology**
Integrate with your current tech stack for a seamless data flow
[More Info](#)

FEATURES

Surefire Features

Surefire CRM is designed to amplify Marketing efforts and empower mortgage marketers to deliver borrowers to Loan Officers again and again. And for that reason, Loan Officers love Surefire.

Marketing

- Award winning creative library 1,000+ pieces
- Multi-channel Marketing Automation
- Text Message Marketing
- Lead Generation Forms
- In-Process Video
- Interactive Calculators
- On-Demand Print Services
- Closing Gifts

Tech Stack

- LOS Integration to all major pr (OpenClose, etc.)
- POS Integrations to all major p (etc.)
- Pricing Engine including *Optim*
- Sales Tools
- Social Media
- Zapier
- Open API



TESTIMONIALS

top of mind Surefire CRM Solutions Our Features Resources Company Login [Request a Demo](#)

INDIVIDUAL SOLUTIONS

Our users love Surefire, but don't take our word for it

"We love the videos. It's a hit. Agents love it. Clients love it. We've gotten referrals out of it."

Scott Asaro | Point Mortgage

Perceived Positioning

HELPFUL PROBLEM SOLVER - Provides a one-stop-shop solution for any and every mortgage company. Promises set-it-and-forget it system that gets the job done.

What They Say

TAGLINE - #1 most-used mortgage CRM

PROMISE - Solutions that scale for all mortgage lenders

PURPOSE - Top of Mind Networks was created with the vision to provide customized, turn-key CRM solutions to the mortgage industry

MISSION - We value integrity, honesty, empathy, dedication, humility and fun

DO - We help you win new business, earn repeat business and gain referral business

Brand Architecture

Master brand with sub-branded products/features:

Surefire CRM

Archetype

THE EVERYMAN - Honest, humble, friendly and down-to-earth. Doesn't exclude anyone and strives for connection and inclusion.

What This Means For Total Expert

Top of Mind looks premium and tells you what they deliver in plain language. Their brand is delivered in a plain-spoken, comforting tone without feeling oversimplified.

Claims

The #1 most-used mortgage CRM in the industry

No matter what your business role or company size, you'll be able to get the job done with Surefire

Mortgage marketers and loan officers love Surefire

Offers

"Set it and forget it"

Work with a suite of features designed specifically to help mortgage professionals market to their database, improve referral relationships and close more loans

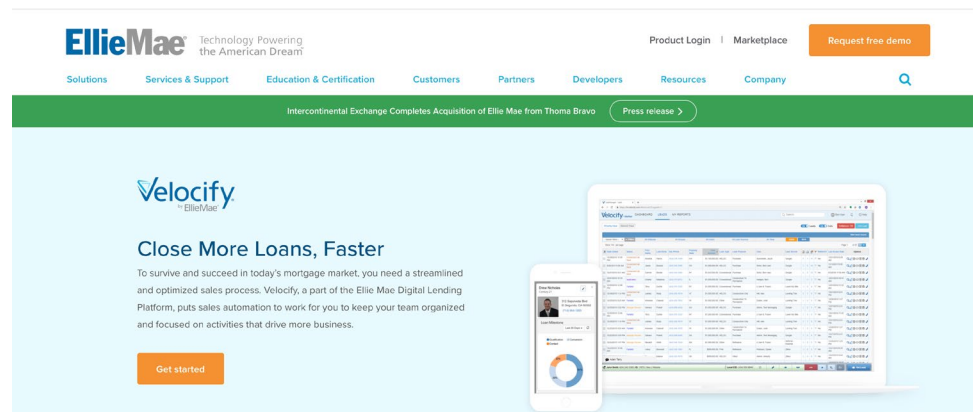
Surefire has truly grown into a one-stop shop for mortgage professionals to handle all of their customer relationship management needs

Velocity

<https://www.elliemae.com/velocity>




Look: corporate/clean/friendly

HOME HERO



FEATURES

Lenders and loan officers unite

 <p>Productivity</p> <p>The lending process requires performing a multitude of sales and marketing activities, keeping realtors up to date, and engaging with potential borrowers. Help loan officers close more loans with tools built specifically to delight borrowers and simplify the referral, sales, and marketing processes.</p>	 <p>Compliance</p> <p>Enforcing compliance across various branches with multiple loan officers is challenging. The potential financial risk and liabilities are very real. Leverage a platform that makes compliance a breeze with automated and corporate-approved messaging that includes borrower opt-in functionality.</p>	 <p>Visibility</p> <p>Having data spread across disparate systems is problematic. Track all activities, from referral to close, and beyond, with a centralized report hub, giving you the ability to optimize your sales process and make data driven decisions.</p>
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ICONOGRAPHY

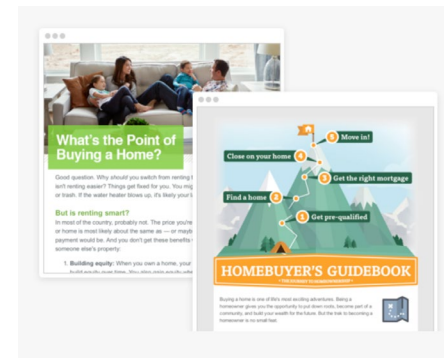


Visibility

Having data spread across disparate systems is problematic. Track all activities, from referral to close, and beyond, with a centralized report hub, giving you the ability to optimize your sales process and make data driven decisions.



PARTNER CONTENT

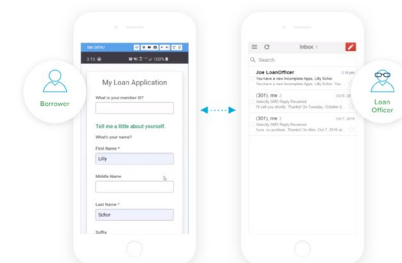


TOOLS

Velocity LeadManager Essentials

Do you know that over 40% of consumers who start an online application never finish it? Give your team the tools to maximize conversions and capture more business – without any additional burden on your loan officers. Start seeing how converting automated texts and email communication could help you convert more applications, speed up the loan process, stay compliant, and enforce consistency across your messaging.

[Learn more](#)



Perceived Positioning

VOLUME POWERHOUSE - A suite of solutions designed to streamline and optimize the sales process; a part of the Ellie Mae Digital Lending Platform

What They Say

TAGLINE - Close more loans, faster

PROMISE - Turn more leads into mortgages

PURPOSE - Cloud-based, intelligent sales automation software designed for fast-paced, high-volume sales environments

MISSION - Helping sales teams work at the speed of opportunity since '04

DO - Comprehensive lead management solution perfect for mortgage brokers, educational institutions and insurance organizations that primarily sell their products or services over the phone or via email

Brand Architecture

Offered as a lead engagement solution (sub-brand) of Ellie Mae. Components include Velocify Pulse, Velocify LeadManager Enterprise, Velocify LeadManager Essentials, Velocify LoanEngage.

Archetype

SAGE - Knowledgeable, assured, guiding. Focused on showing the customer the path to wisdom through information, expertise and intelligence.

What This Means For Total Expert

Velocify, like Encompass, looks clean and corporate. The brand is delivered in a casual tone using empathy to make the audience feel like the brand is on their side.

Claims

Get the power to boost revenue, accelerate performance and optimize sales with a lead engagement solution that delivers more

Instantly transform your Salesforce environment into a powerful sales prospecting, closing and reporting engine

Offers

Trusted by industry leaders

Market-leading provider of cloud-based intelligent sales software, designed for high velocity sales environments

Helps more than 1,500 sales teams sell more by streamlining and optimizing the sales process from start to finish

With Velocify, leads don't fall through the cracks anymore

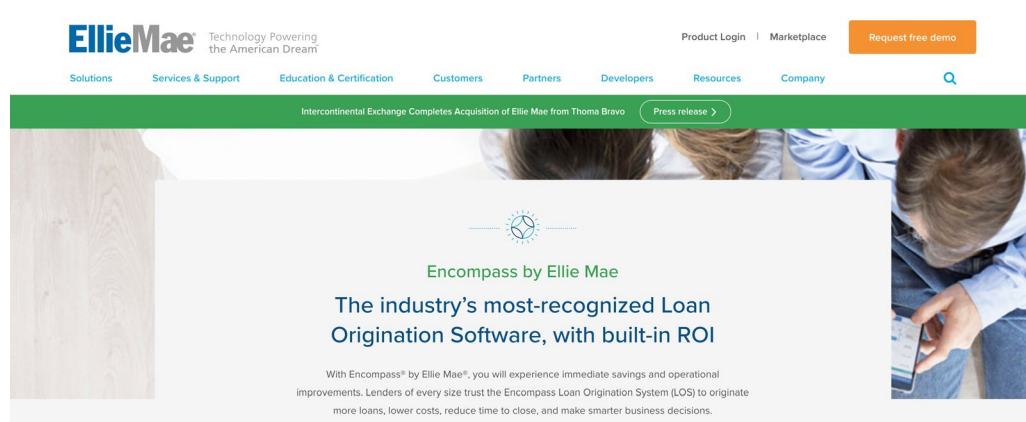
Increase your lead conversion rates by up to 400%

Encompass

<https://www.elliemae.com/encompass>

Look: corporate/clean/bright

HOME HERO



ICONOGRAPHY



ROI CALLOUTS

ROI that speaks for itself

With origination costs near \$8,000 per loan (according to the MBA), efficiency is the key to profitability. Developed with this in mind, Encompass delivers immediate ROI impact. In fact, MarketWise Advisors recently conducted independent studies which found that Encompass lenders:

FEATURES

<p>URLA-readiness</p> <p>Ensure seamless transitions and smooth business operations</p>	<p>All-in-one system</p> <p>Lenders can access everything they need from a single point of record</p>	<p>Instant average annual ROI of 698%</p> <p>Save an average of 23.5 hours in loan origination and fulfillment time</p>
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TESTIMONIALS

Perceived Positioning

INDUSTRY-LEADING TECHNOLOGY - Fully configurable, all-in-one design solution for every aspect of your business

What They Say

TAGLINE - Delivering ROI like no other

PROMISE - Originate more loans and maximize ROI

PURPOSE - Help the lender streamline the origination process

MISSION - Improve the closing rate without reducing loan quality

DO - Leverages a focused solution that automates one-to-one marketing capabilities, fosters better referral relationships and helps you stay compliant

Brand Architecture

Offered as a consumer engagement solution (sub-brand) of Ellie Mae, the leading cloud-based platform provider for the mortgage industry

Archetype

SAGE - Knowledgeable, assured, guiding. Focused on showing the customer the path to wisdom through information, expertise and intelligence.

What This Means For Total Expert

Encompass looks clean and corporate and uses guiding language to stress the value behind its offering. The more formal, corporate brand tone matches well with the abundance of ROI data.

Claims

No solution delivers ROI like Encompass

Receive an average of \$813 in savings and operational improvement per loan through improved compliance, loan quality and efficiency

698% ROI over 5 years

1.9 months average annual break-even point in each of the first five years

Technology that powers more than 40% of residential lending transactions in the United States

Offers

See why lenders across the industry trust our Encompass® by Ellie Mae to help them originate more loans, lower costs, reduce time to close and make smarter decisions

Get a loan origination system that's an ROI machine

Unify

<https://unifycrm.com/>

Look: cold/corporate/dated

HOME HERO

unify

Home True Mobile CRM Solutions Contact Blog

All the tools for growth. All in one mortgage CRM.

Unify gives top mortgage professionals the tools needed to grow their business. Manage key relationships, send marketing campaigns, and track leads — all in one place built specifically for mortgage professionals.

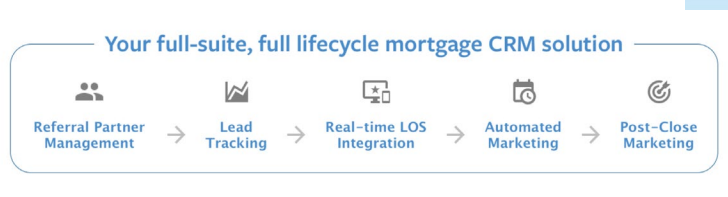
[REQUEST A DEMO](#)

ICONOGRAPHY



TOOLS

FEATURES



Tools built to solve your unique problems. All included.

Being a mortgage crm professional is hard. We want to make it easier. That's why we used our in-depth understanding of the unique demands in your industry to build all the mortgage crm tools in Unify. It's also why we include them all in one easy-to-use cloud-based system.

- Real-time LOS integration
- Contact, lead, and pipeline management
- iOS and Android applications
- Automated marketing communications
- Multi-channel marketing (including video)
- Lending opportunity notifications
- Dashboard alerts
- Compliance Management

[REQUEST A DEMO](#)

Perceived Positioning

TOP OF THE FOOD CHAIN - Provides “best-in-class” platform and demonstrates success

What They Say

PROMISE - We provide you with superior technology so you can stay organized and grow your business

PURPOSE - Business-building tools for busy loan originators

DO - Unify is a full-suite Mortgage CRM solution that offers more than just marketing. It includes all the tools you need to grow your business all in one system.

Brand Architecture

Master brand without product sub-brands

Archetype

RULER - Possesses a high degree of confidence and has an innate desire to be the leader. Seeks to prevent chaos for customers by taking control.

Claims

Trusted by thousands of industry leaders

First complete Mobile CRM for the mortgage industry

Built specifically for mortgage professionals

Unify is the best mortgage CRM that can help you create more lending opportunities and manage them more efficiently

Offers

All the tools for growth

All in one CRM

Exceed your sales goals more efficiently

What This Means For Total Expert

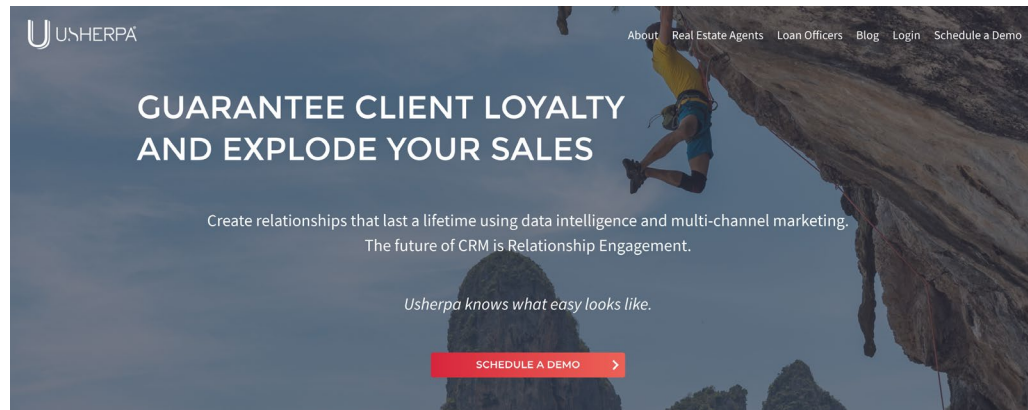
Unify uses superlatives, authority and impressive data points to tell you their product is the best. The product is delivered with lots of screenshots inside the CRM, but the brand never really shows up.

Usherpa

<https://usherpa.com/>

Look: mixed-up

HOME HERO



FEATURES

UNIQUELY USHERPA FEATURES



Experience Easy

Usherpa knows what easy looks like. Our seamless, foolproof platform and robust data intelligence create opportunities you can bank on.



Automate and Grow

Never stress for your success! Usherpa's intuitive Relationship Engagement Platform and robust CRM presents opportunities in an easy-to-use format.

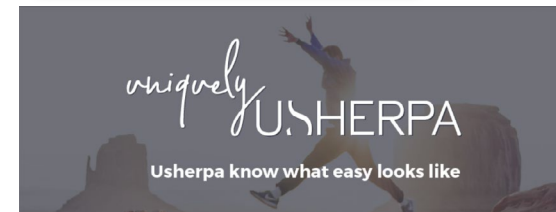
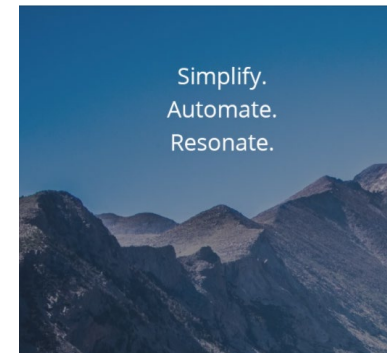


Develop Business Strategies

At Usherpa, care about your success - which is why we crafted our Master Ascent Plan! MAP gives you everything you need to fully employ the tools available from Usherpa.



CAMPAIGNS



TESTIMONIALS

DAVID ATTRIBUTES 38 LOANS A YEAR TO USHERPA

“

I took a look at my last year's production numbers and I attribute 38 loans to Usherpa. Thank you guys and keep up the excellent work!

-David J. | Washington, D.C.

Perceived Positioning

DREAM COME TRUE - Promises a foolproof solution for making the LO's job easier while exploding their sales

What They Say

TAGLINE - Simplify. Automate. Resonate.

PROMISE - Usherpa knows what easy looks like

MISSION - Provide loan officers with state-of-the-art technology that maximizes their relationship engagement while simplifying their lives

DO - Create relationships that last a lifetime using data intelligence and multi-channel marketing

BELIEFS - We believe engaging your network should be simple and marketing solutions shouldn't be a distraction from your business

Brand Architecture

Master brand without product sub-brands

Archetype

THE MAGICIAN - Transformative, knowledgeable, visionary. Takes customers on a transformational journey.

What This Means For Total Expert

Usherpa uses empathy and client testimonials to tell you how easy they're going to make your life. Their brand looks dated, slapped together and the storytelling doesn't live up to its empathetic tone.

Claims

Usherpa is the last CRM you'll ever need

Insanely easy technology

Building repeat business and lifelong referrals is simple when you have the right tools

Offers

Guarantee client loyalty and explode your sales

Experience the peace of mind you'll find through Usherpa's streamlined solutions

Close deals with less effort

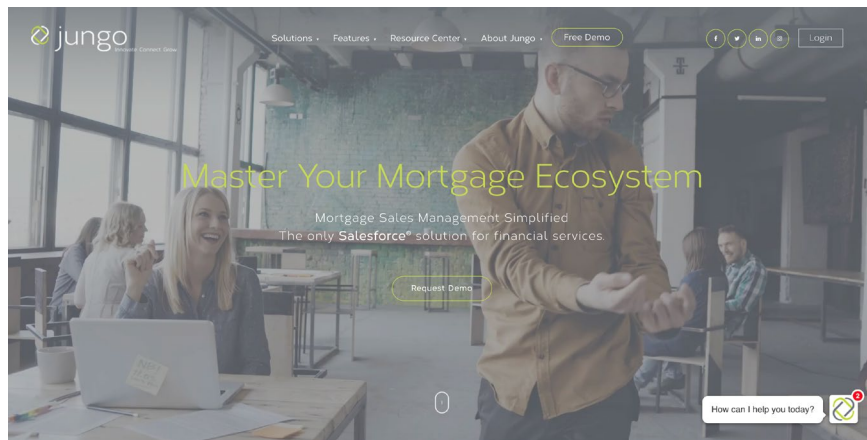
Never stress for your success!

Jungo





<https://www.ijungo.com/>


Look: accessible/energetic/fun

HOME HERO




SOLUTIONS

 <p>MARKETING</p> <p>Jungo delivers powerful multi-channel marketing from one centralized platform. Easily scalable for enterprise volume, you get consistent branding across the board with improved ROI tracking.</p> <p>Learn More</p>	 <p>CO-MARKETING</p> <p>Jungo helps you attract and build profitable relationships with referral partners. Easily customize Jungo's flyers, emails and post-closing cards with the correct branding in place, then track your results with customized reporting.</p> <p>Learn More</p>	 <p>COMPLIANCE</p> <p>Maintain compliance with Jungo's on-demand audit-level reporting. Track cost allocations, distributions and payments – and make data-driven decisions based on the metrics that matter most to your business.</p> <p>Learn More</p>	 <p>CRM</p> <p>Simplify database management with a centralized system designed to grow your business. All activities and documents stay attached to the contact record for convenient access.</p> <p>Learn More</p>
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Built on Salesforce®, the World's #1 Customer Success Platform.

Jungo provides financial industry experts with marketing, co-marketing, compliance and CRM solutions from one login. It is a one-stop-shop solution, integrating with thousands of leading platforms to give clients the ability to track, interact with, and market to all of their contacts.


Jungo with Salesforce
 Access Jungo on any mobile device with the Salesforce Mobile App




TESTIMONIALS




People  Jungo

Leveraging technology to create innovative solutions for the financial services industries for more than 10 years

INDUSTRY SUCCESS


Proven Industry Success.

Read More Success Stories.

Why Jungo?



Perceived Positioning

A CUTTING-EDGE FORCE TO BE RECKONED WITH - Layered onto the power of the Salesforce platform, provides time-saving/efficiency-building capability and customization, particularly important for those with a large client base to manage

What They Say

TAGLINE - Innovate. Connect. Grow.

PROMISE - Mortgage sales management simplified

PURPOSE - Celebrating the human desire to connect

MISSION - To provide ease, access and a variety of capabilities that help businesses connect with customers and drive success

DO - Marketing, co-marketing, compliance and CRM solutions from one login

Brand Architecture

Master brand without product sub-brands

Archetype

JESTER - Pursues connection, pleasure and enjoyment. Lighthearted, optimistic, playful, fun-loving. Feels an obligation to be a ray of sunshine.

What This Means For Total Expert

Jungo looks contemporary and tells you what they offer in super-short, simple language. The messaging tone of voice, while simple, doesn't match the brand's fun-loving and playful imagery.

Claims

Preeminent expert in the field, built on Salesforce, the world's #1 customer success platform

Proven industry success; has created innovative solutions for the financial services industry for 10+ years

The only Salesforce solution for financial services

Time saving, one-stop-shop solution that integrates with thousands of leading platforms, providing the ability to track, interact with and market to all of your contacts

Offers

Master your mortgage ecosystem

Optimize your mortgage business today

Closing loans has never been easier

See what all the fuss is about

Competition at a Glance



“THE ENTERPRISE ONE”

Brand Voice:
AUTHORITATIVE
SMART
SERIOUS

Messaging Strategy:

Focused on helping companies and their LO's and partners understand the importance of the consumer journey. Most obvious positioning is a unique tool for attracting and keeping customers for life.



“THE MOST POPULAR ONE”

Brand Voice:
CARING
WARM
REASSURING

Messaging Strategy:

Focused on features and educating audiences on how the system works for specific business models and roles. Helps the product be perceived as “most popular” and “works for everyone.”



“THE POWERFUL ONE”

Brand Voice:
STRONG
COMFORTING
EMPOWERING

Messaging Strategy:

Positions the platform as a virtual administrative team member, organizing, supporting and enabling the client to focus on activities that boost sales engagement and drive business.



“THE EFFECTIVE ONE”

Brand Voice:
ASSURED
NO-NONSENSE
UNDERSTANDING

Messaging Strategy:

Focused on the platform's efficiency as the key to profitability and maximizing measurable returns for every loan. Differentiates the brand by emphasizing that its features meet the real-world needs of the lender.



“THE BEST ONE”

Brand Voice:
MATTER-OF-FACT
SUPERIOR
EMPATHETIC

Messaging Strategy:

Focused on the pain points of industry processes and positions the product as the right tool to address them.



“THE EASIEST ONE”

Brand Voice:
AUTHENTIC
CASUAL
PASSIONATE

Messaging Strategy:

Focused on company and customer stories to help audiences connect with the brand and perceive the product as trusted and reliable. Benefit-led feature descriptions position the product as easy to choose and easy to use.



“THE COOLEST ONE”

Brand Voice:
EMPATHETIC
RELAXED
CONFIDANT

Messaging Strategy:

Focused on the “why” behind the platform's capabilities, enabling the evolution of human connection through leading-edge technology. Emphasis on time saving, efficiency and integration leading to ease of managing the mortgage ecosystem and ultimately, better quality of life.

Brand Strengths

Total Expert is the acknowledged industry pioneer in fintech for financial services, having developed and successfully marketed the industry's first purpose-built marketing operating system. The company continues to be 100% focused on financial services and makes advances in technology an ongoing priority. The brand gets consistently high marks from consumers on social media and from reviewers for delivery of a positive customer experience, ease of installation and use, seamless integration and quality of support. Total Expert is a clear leader, powering marketing and revenue for 10% of the \$2 trillion annual U.S. mortgage industry.

Brand Weaknesses

Despite its leadership position, Total Expert has a fairly generic brand persona, as represented on its website, in social media and in other communications. Messaging does not clearly define the brand's value proposition versus its competitors. Current communications offer up multiple, somewhat disparate themes rather than a coherent, consistent and strategic message that reinforces the brand's optimal positioning with its desired audiences. The language used is fairly generic and therefore not memorable. Though the brand's stated commitment is to humanize the customer fintech experience, build trust and create lifetime customers, the website uses dark colors and images, is text-heavy and features few pictures of people. From a brand promise standpoint, though performance is generally good, some issues have been noted on social media regarding download speed of large files, relative to competitors.

Brand Opportunities

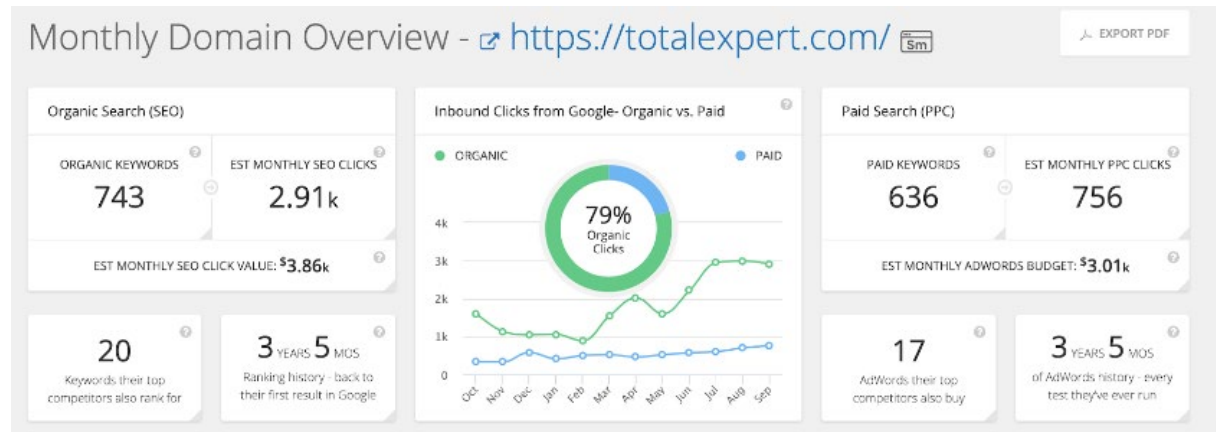
Total Expert's fundamentals and business strategy are sound, and its performance strong suits are many. Coming from this solid platform, the brand can identify, define and own a high-potential and defensible positioning that lends itself to messaging resonant with both current and prospective customers. A current understanding of the evolving needs of these audiences is essential to developing an effective long-term strategy. Inculcating this enhanced brand strategy within Total Expert's company culture will also be imperative to sustain measurable impact and growth.

Brand Threats

Newer and/or more nimble competitors with sharply defined and more contemporary positioning and messaging represent an area of concern for the Total Expert brand. Category leaders are perpetually vulnerable to inroads from challenger brands, as well as other market leaders, and the best defense is a clear, sustainable brand strategy executed through relevant, consistent messaging. Continued vigilance with regard to technology is another area to watch, as the ever-accelerating pace of innovation can topple a market leader that takes its eye off the ball even momentarily.

Website SEO

- In organic search, Total Expert is currently ranking for a significant number of B2C keywords. Total Expert should prioritize keywords and content on B2B traffic by increasing on-page and blog content that concentrates on Total Expert service lines and product offerings.



- Take advantage of low-hanging fruit with regard to search terms that are almost ranking on Page 1 (see page 33 of this report for examples)
- Highly valued search terms should be integrated into the larger brand key messaging strategy in addition to ongoing content, i.e., on page, blogs and ad campaigns



Sample of terms that competitors are ranking but which Total Expert is not and should target:

top mortgage crm software

mortgage email marketing

mortgage document software

mortgage document management

loan mortgage officer software

mortgage crm software

mortgage email marketing

how much does jungo crm cost?

mortgage software

loan officer leads

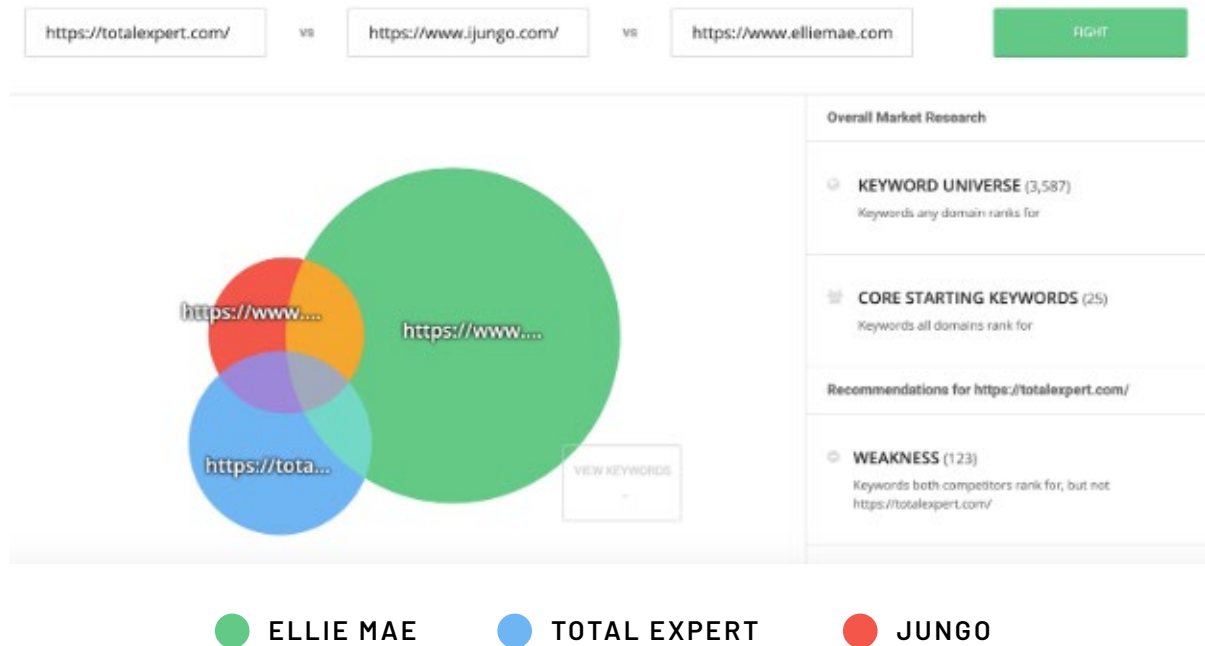
mortgage los

loan officer software

mortgage lead sources

crm mortgage software

mortgage company software



Most Profitable Ads and Keywords

Best Keywords

FILTER
EXPORT ALL

Keyword	Clicks/Mo	Cost/Click	Coverage	2020									
				Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	
mortgage crm	151	\$22.05	91.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	AD
<div style="border: 1px solid red; padding: 5px;"> <p>HighlightAd Copy</p> <p>Mortgage CRM - Enterprise CRM & Marketing http://totalexpert.com/ Enterprise CRM, Marketing, and Compliance. Trusted by 9 of the Top 15 Lenders.</p> <p><i>Ad Position: 4 Date: August 2020</i></p> </div>													
crm mortgage	5.4	\$23.60	75%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
mortgage marketing tools	1.8	\$17.09	91.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
mortgage crm software	20.1	\$26.25	50%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
velocity crm	6.6	\$15.98	66.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
mcif	18.9	\$4.74	41.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
Velocity Pricing	2.4	\$27.33	75%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
credit union advertising	25.1	\$8.76	33.3%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
liondesk.com	6.1	\$16.11	58.3%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
velocity competitors	0.16	\$47.91	91.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
credit union marketing	27.6	\$3.79	41.7%	AD	AD	AD	AD	AD	AD	AD	AD	AD	
total experts	0.39	\$0.77	75%	AD	AD	AD	AD	AD	AD	AD	AD	AD	

Top Ads

Learn how to use Ad History

HIGHLIGHT

Total Expert Mortgage CRM | Built to Drive Massive Growth
<http://totalexpert.com/>
 CRM, Marketing, Compliance, and Automation. Trusted by 9 of the Top 15 Lenders. CRM/Sales. Features: Deploy Multi-Channel Marketing, Ensure Marketing Compliance, Onboard With Ease, Meet All Your Marke

16% of Ads Served

48% in Top of Page

3 Avg. Position

HIGHLIGHT

Mortgage CRM | Enterprise CRM & Marketing
<http://totalexpert.com/>
 Enterprise CRM, Marketing, and Compliance. Trusted by 9 of the Top 15 Lenders. CRM/Sales. Features: Deploy Multi-Channel Marketing, Ensure Marketing Compliance, Onboard With Ease, Meet All Your Market

11% of Ads Served

87% in Top of Page

3 Avg. Position

HIGHLIGHT

Mortgage Marketing Tools | Trusted by 9 of Top 15 Lenders
<http://totalexpert.com/>
 Automate, Deploy and Track Your Marketing Activities From the Top Down. CRM/Sales. Co-Marketing - CRM - Compliance - Marketing

10% of Ads Served

93% in Top of Page

1 Avg. Position

Keyword	Clicks/Mo	Cost/Click	Coverage	«Prev Mo	Next Mo»
				May	June July Aug
mortgage application software	141	\$8.31	33.3%	AD AD	AD AD
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Copy Screenshot </div> <div style="border: 1px solid #00aaff; padding: 5px; margin: 5px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Highlight Ad Copy Screenshot </div> <p>#1 Mortgage CRM Software Trusted by 1000's of Brokers http://topofmind.com/ Trusted by Mortgage Professionals Ranging From Small Teams to Credit Unions and Bankers. Includes Dynamic Videos, Interactive Tools & Games, Calculators, Flyer Design. Get a Demo! Dozens of Integratio</p> <p><i>Ad Position: 1 Date: August 2020</i></p> </div> </div>					
mortgage software	761	\$6.66	25%	AD	AD AD
loan officer marketing	116	\$8.49	25%	AD AD	AD
mortgage marketing strategies	30.3	\$12.68	25%	AD	AD AD
mortgage broker software	38.1	\$11.63	33.3%	AD AD	AD AD
mortgage management software	17.1	\$3.27	41.7%	AD AD	AD AD
mortgage lending software	268	\$7.37	25%	AD AD	AD
mortgage crm	151	\$22.05	16.7%	AD	AD
mortgage underwriting software	16.2	\$9.22	33.3%	AD AD	AD AD
mortgage marketing ideas	1.8	\$14.47	33.3%	AD AD	AD AD
mortgage software	0	\$3.98	25%	AD AD	AD
marketing loan officers	9	\$10.56	25%	AD AD	AD
mortgage office software	3	\$9.15	25%	AD AD	AD
mortgage banking software	17.1	\$5.16	25%	AD AD	AD
mortgage systems	297	\$6.08	16.7%	AD	AD
mortgage loan marketing ideas	0.33	\$19.34	33.3%	AD AD	AD AD

Top Ads [?]

SELECT All / None

[Learn how to use Ad History](#)

HIGHLIGHT

#1 Mortgage Software | Specifically for Loan Officers
<http://topofmind.com/>
 Includes Dynamic Videos, Interactive Tools & Games, Calculators, Flyer Design. Get a Demo! Trusted by Mortgage Professionals Ranging From Small Teams to Credit Unions and Bankers. Integrates with Your

9% of Ads Served

71% in Top of Page

4 Avg. Position

HIGHLIGHT

Mortgage Marketing & CRM | Specifically for Loan Officers
<http://topofmind.com/>
 Trusted by Mortgage Professionals Ranging From Small Teams to Credit Unions and Bankers. More Calls, Leads & Deals. Includes Dynamic Videos, Mortgage Calculators, Tools & Games. Dazzle with Video. Any

5% of Ads Served

75% in Top of Page

2 Avg. Position

HIGHLIGHT

Mortgage Marketing Strategies | Specifically for Loan Officers
<http://topofmind.com/>
 Trusted by Mortgage Professionals Ranging From Small Teams to Credit Unions and Bankers. Includes Dynamic Videos, Interactive Tools & Games, Calculators, Flyer Design. Get a Demo! Interactive Tools &

5% of Ads Served

75% in Top of Page

2 Avg. Position

HIGHLIGHT

#1 Mortgage Broker Software - Specifically for Loan Officers
<http://topofmind.com/>
 Trusted by Mortgage Professionals Ranging From Small Teams to Credit Unions and Bankers. Includes Dynamic Videos, Interactive Tools & Games, Calculators, Flyer Design. Get a Demo! Interactive Tools &

5% of Ads Served

25% in Top of Page

3 Avg. Position

Title	Url
Total Expert	https://totalexpert.com/
What does Warren Buffet think about 30 Year Mortgages? Total ...	https://totalexpert.com/what-does-warren-buffet-think-about-30-year-mortgages/
KS StateBank Enhances Customer Experience with Robust ...	https://blog.totalexpert.com/press/ks-statebank-enhances-customer-experience-with-robust-...
Real Estate Business Cards: Dos and Don'ts	https://blog.totalexpert.com/real-estate-business-cards-dos-and-donts
uexpress: From Financing to Flooring, Customer Service is Lacking	https://blog.totalexpert.com/press/uexpress-from-financing-to-flooring-customer-service-is-lacking
New Rez Total Expert	https://totalexpert.com/customers/new-rez/
Alerus Financial Selects Total Expert to Personalize and Automate ...	https://totalexpert.com/alerus-financial-selects-total-expert-to-personalize-and-automate-...
First Heritage Mortgage Total Expert	https://totalexpert.com/customers/first-heritage-mortgage/
MBS Highway/Barry Habib and Total Expert Announce Exclusive ...	https://blog.totalexpert.com/press/mbs-highway/barry-habib-and-total-expert-announce-exclusive-...
[PDF] Logging In - Total Expert Now	https://totalexpert.com/wp-content/uploads/TE_Now_Log_In.pdf
Mortgage Marketing Tools Best Mortgage CRM Total Expert	https://totalexpert.com/mortgage-lending/
How Cardinal Financial Helps People Achieve the American Dream ...	https://totalexpert.com/how-cardinal-financial-helps-people-achieve-the-american-dream-...
MLS Connect Request - Total Expert	https://info.totalexpert.com/mls-connect
Pacific Union Financial Chooses Total Expert to Power New ...	https://totalexpert.com/pacific-union-financial-chooses-total-expert-to-power-new-marke-...
Mann Mortgage Selects Total Expert as All-Encompassing ...	https://totalexpert.com/mann-mortgage-selects-total-expert-as-all-encompassing-marke-...
Sales: A Journey, Not a Destination with Finance of America's Bill ...	https://totalexpert.com/sales-a-journey-not-a-destination-with-finance-of-americas-bill-d-...
Total Expert Takes No. 105 on Inc. 500 List of Fastest-Growing ...	https://totalexpert.com/total-expert-takes-no-105-on-inc-500-list-of-fastest-growing-com-...
CRM for Sales Total Expert	https://totalexpert.com/crm-sales/
Nearly One Quarter of Scotsman Guide Top Originators in 2017 are ...	https://totalexpert.com/nearly-one-quarter-of-scotsman-guide-top-originators-in-2017-ar-...

Next Steps

So, what is Total Expert's key point of difference?

None of the competitors assessed has a strong, clearly communicated brand position focused on **putting the consumer first**.

- Most talk about product features that make the job easier, and a couple touch on the importance of connection, relationships and engagement.
-

Only Total Expert mentions the “consumer journey” and making the consumer the central focus of the business and its product capabilities. This positioning is alluded to in Total Expert's mission and comes through in some of the current messaging.

However, while this positioning is based on Total Expert's brand strength and has potential as a strategic platform, the current messaging is not as compelling, consistent or memorable as it could be.

ACTION ITEM

More discussion is needed around finding TE's point of difference and what will resonate with audiences. Are we a sea change for our clients' culture? Are we a recruiting machine to help clients attract and retain top producers? Are we the orchestrators of our clients' customer experience. Or something else?

Reassess, refine, strengthen.

1

Work on the overall brand position.

If Total Expert wants prospects to believe you are different from the competition, we need to create compelling positioning that explains how, and why.

2

Revamp the messaging platform to help unify the brand.

Revamp the messaging platform to unify and reinforce the revised brand positioning.

3

Work on the customer approach.

Pull the messaging through from the new platform using compelling storytelling that focuses on what clients really care about. Let's make sure audiences know Total Expert is a sales and marketing mortgage CRM first.

4

Evaluate keywords and re-work website copy.

The most important keywords need to relate to who Total Expert is for the consumer, ensuring alignment with the strategic positioning and refocused marketing messages. Website copy should have a consistent, strategic theme that echoes throughout all content.

Appendix

Google keyword Report

Pulled 9/18/2020

[VIEW FULL REPORT](#)



HIFI