

Total Expert

Mortgage Messaging Strategy

PRESENTED BY:

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About this work.

Although the brand positioning as defined in this document is focused on mortgage, the framework is flexible enough to accommodate the company's additional financial verticals. The messaging strategy we've created more or less transcends these verticals and focuses on accurately communicating the differences in Total Expert's mission, vision and product.

We've also made a strategic shift in tone to make Total Expert's messaging exude the empathy that's built in to the company's unique human approach.

What should a Brand Position and Messaging Strategy accomplish?

- 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

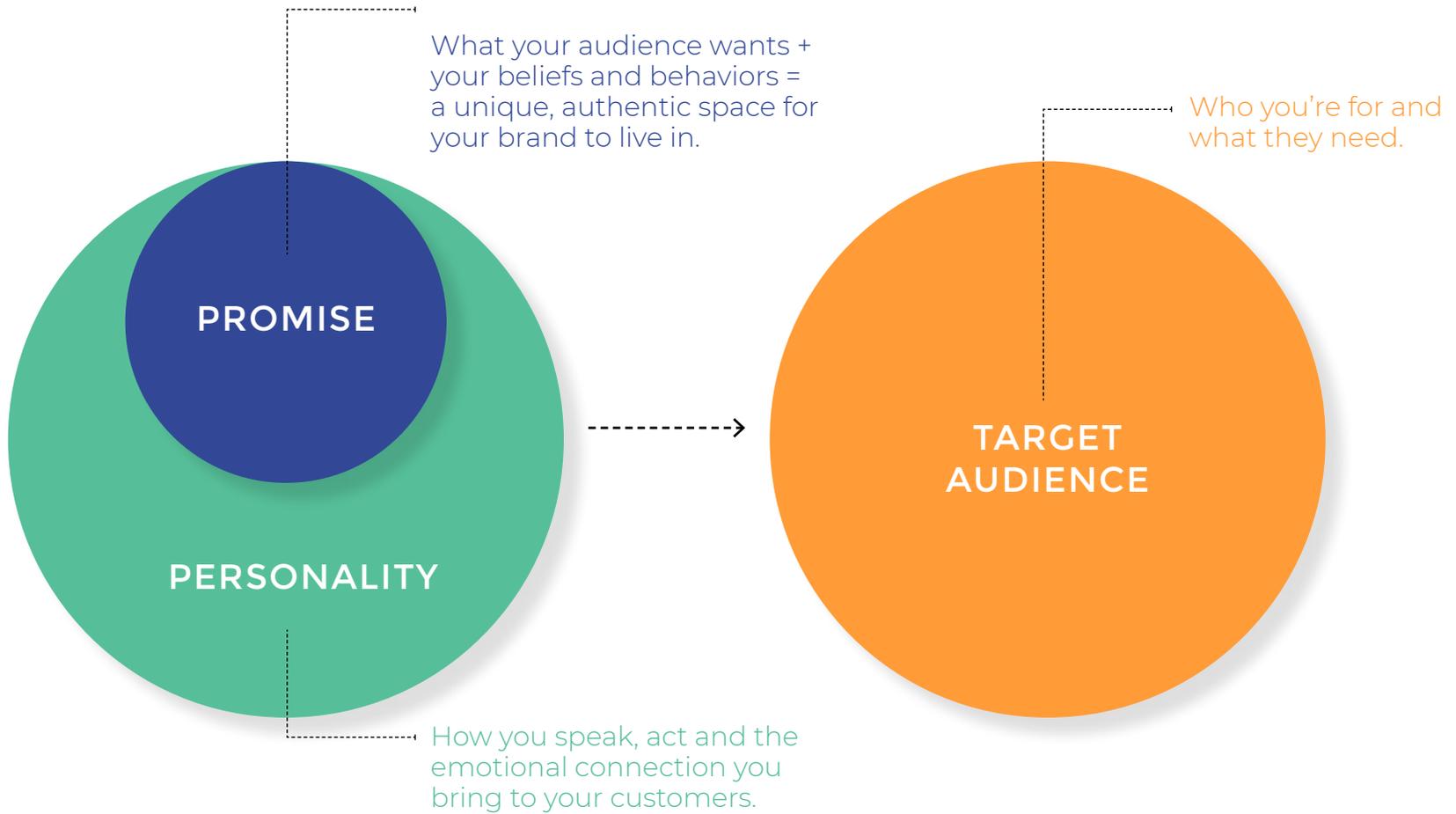
- True to both the realities and aspirations of Total Expert

- 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

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



PERSONALITY

Total Expert blends deep financial knowledge,
technology and an intense focus on the
customer experience to empower mortgage
companies to serve their customers in a more
connected and personal way.

PROMISE

TARGET
AUDIENCE

Who We Are: (Brand)

Total Expert blends deep financial knowledge, technology and an intense focus on the customer experience to empower mortgage companies to serve their customers in a more connected and personal way.

What We Do: (Offering)

Through our Total Experience Platform, we make it easier for companies and their partners to establish a unified strategy for customer engagement, orchestrate best-in-class consumer experiences across multiple platforms and build lifelong financial relationships.

How We Do It: (Approach)

By combining data, marketing, sales, and compliance all in one platform, Total Expert tackles the challenges of engaging with customers, all while maintaining a human experience that promotes connection and trust in the real world.

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

Experts in the mortgage industry, we're well-versed in the importance of sincere, knowledgeable and helpful humans throughout the mortgage process. We know your customers lean on you and your expertise to make sense of mortgages—plus a whole lot more.

Inherently innovative, we looked around and wondered why existing technologies didn't do more to foster those real (and really important) personal relationships and how we could make life better for mortgage companies and the communities they serve.

Our big idea? Design an alternative to multiple, disparate technologies that never really focused on the customer in the first place. The Total Experience Platform brings all of your customer data together and makes it refreshingly simple to create stronger relationships from day one through personalized engagements versus a one-size-fits-all marketing approach.

Our core industry, brand and product messaging threads.

INDUSTRY

We're bringing a human touch to the high-tech world of mortgage banking by bringing people, relationships and customers forward. At Total Expert, we're all about the ease of technology coupled with a human-centered approach.

BRAND

Our company is defined by customer experiences. We're the platform that takes the pain out of designing them and deploying them in a personalized and human way. It's a new way of thinking that makes life better for mortgage teams, too.

PRODUCT

Total Expert helps you deliver deeply personal products and experiences through technology that's centered on the customer. Technology that helps you reach out, listen and communicate with customers when and how they want it.

We're bringing humanity into complicated financial transactions.

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

In a big world, relationships still matter.

Build your brand, connect with your people and foster lifelong customer relationships.

Lead with customers.

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

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.

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

Total Expert helps you put your customers at ease and take your relationship to the next level for the next step in their financial journey.

Any CRM can help you get things done.

The Total Experience Platform helps you transition and transform into a customer-led company.

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 that puts the customer experience first.

Total Expert's brand voice is...

We've walked in our customers' shoes, and we know financial, marketing and technology speak can be a minefield of confusing terminology. That's why we speak in an educated, encouraging and informal way.

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. We speak like experienced and compassionate business partners to educate people without patronizing or confusing them.

Real

Authenticity is crucial to our storytelling approach. When we use empathy and our point of view to reveal truths and insights to our customers, we bring joy and simplicity to their work and financial health to the world.

Ambitious

At Total Expert, we are all determined. We dream big, we set big goals, and once those are met we set the next ones even higher. Our messaging should reflect this optimistic 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 we take our customers seriously. That seriousness doesn't preclude an appreciation of wit and craft.

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