

Total Expert Expands Customer Intelligence Solution to Include Consumer Life Event Data

Total Expert expands Customer Intelligence solution with Life Event data, empowering FIs to engage at moments that matter and maximize customer lifetime value.

MINNEAPOLIS, MN, UNITED STATES, March 7, 2024 /EINPresswire.com/ -- Total Expert, the leading customer engagement platform built for modern financial institutions, announces a major expansion of its industry-leading Customer Intelligence solution with the addition of life event data capabilities.



Total Expert broadens its Customer Intelligence Solution by incorporating Consumer Life Event Data.

Life Events insights combine a financial institution's in-house data with third-party data to continuously strengthen their contact profiles and help modern banks, credit unions, lenders, and insurance brokers fully understand each consumer's needs. By identifying critical moments in a consumer's life, financial institutions can show up when it matters most; educate, engage, and advise their customers; and maximize the lifetime value of every customer.

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By expanding the data capabilities of our Customer Intelligence solution to include Life Event insights, we're enabling our customers to engage at the moments that matter.”

*Joe Welu, Founder & CEO of
Total Expert*

"Our team strives to consistently deliver new cutting-edge ways to help financial institutions better drive growth and win customers for life. By expanding the data capabilities of our Customer Intelligence solution to include Life Event insights, we're enabling our customers to engage at the moments that matter," stated Total Expert Founder & CEO

Joe Welu. "Imagine being able to let a customer know your institution is there to help them when buying a home, getting married, reaching retirement age, etc. The addition of Life Events is a powerful step toward financial institutions fostering enduring consumer relationships because they now have better insights into exactly when to engage and/or nurture those relationships and the information needed to become a trusted financial partner for life."

In 2023, Total Expert Customer Intelligence surfaced over 2B insights and orchestrated journeys that have culminated in excess of \$10.7 billion in loan applications and \$6.7 billion in funded loans. A significant portion of those loans came from re-engaged leads and former customers who would have otherwise been overlooked due to long periods of inactivity in the lenders' databases. With the addition of Life Events data and insights, Customer Intelligence users can further pinpoint and capitalize on opportunities within their existing database by engaging consumers before they make a major financial decision.



Life Event Data will enable FIs to connect with customers during significant moments and enhance customer lifetime value.

Examples of Life Events insights include:

- Marriage/divorce
- New parent/adoption
- Graduation
- Career change
- Home purchase/relocation
- Retirement
- Age milestones (18, 25, 26, 59, 65, 67)

To learn more about how Life Events enhances Total Expert Customer Intelligence, visit www.totalexpert.com.

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. For conversations between modern bankers, lenders, and insurers on leadership and innovation, listen to the [Expert Insights podcast](#) hosted by Total Expert Founder and CEO Joe Welu.

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