

BANKING

Success Playbook: A Guide To Your Journey with Total Expert



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Welcome to the Total Expert Family!

We are so excited that you and your team have chosen to partner with us!

In order to set you up for success with Total Expert, we want to give you a clear vision of what your journey will look like as we move forward together. We have created 4 playbooks for you to reference:

Success Playbook 1: Team Structure

First, meet the team members here at Total Expert who will be supporting you throughout our partnership. We have also laid out our recommended role and responsibility chart for your organization in successfully supporting Total Expert.

Success Playbook 2: Let's Get Started

Next, a review of the different phases of implementation including kick off, implementation, training, and preparing to go live. During implementation, you will learn common pitfalls and how to avoid them, as well as the best practices that other customers have used to ensure a successful onboarding experience.

Success Playbook 3: Your Journey with Total Expert

This playbook gives you a look at what to expect on our journey together once implementation is complete and you are ready to go live. You will know what to expect from us throughout the year, communication points, and where to seek help when needed.

Success Playbook 4: Total Expert Family Values

Finally, a look at the values we hold at Total Expert and how they set us apart. Get to know a little bit more about the Total Expert family, and what drives us each and every day!

Again, we are so happy to have the opportunity to work with you and your team. We take it very seriously that you chose us as your partner to drive success within your organization, and we look forward to a long-lasting partnership with you!

On behalf of the whole Total Expert team — welcome to the family!

PLAYBOOK 1

Team Structure

Meet the Total Expert Team

First, here is an overview of your Total Expert team – the experts you will meet as you move through your entire customer journey and partnership with us. We are your advocates, partners, champions, and biggest fans.

Implementation Project Manager

You will have an expert Implementation Project Manager assigned to you, who will be working hand in hand with your internal team throughout your implementation for a successful project kick-off, configuration, data upload, integration, and launch of the Total Expert platform.

Content Coordinator

A Content Coordinator will work with you to create your custom marketing library on Total Expert. Content Coordinators will streamline delivery of your custom requests, communicate requirements along with recommended best practices, and ensure your brand's integrity is maintained.

Training and Education Consultant

You will also have a dedicated Training and Education Consultant who will ensure that your team members are trained and ready to hit the ground running, armed with best practices in the industry.

Customer Success Manager

The Customer Success team begins its relationship with you once implementation is complete, and the relationship never ends. As trusted advisors offering best practices and solutions, your Customer Success Manager is your central touch point, whose primary job is to manage the long-term health and success of each customer. Ensuring customer success requires learning and understanding your needs and definition of success, then enabling you to achieve maximum value from the Total Expert platform.

Customer Support Agents

You and your team will also have direct access to Customer Support Agents, offering live, local, online chat support 6 days a week. Our amazing support team will be your first line of support to help you with troubleshooting and any problem resolution.

Executive Sponsor

And finally, you have an all-access pass to an Executive Sponsor here at Total Expert to be your executive level champion and advocate.

Now that you understand the structure of our internal teams you'll be working with, we also want to provide you with best practices on how you can structure your team to set yourself up for success.

Structuring Your Team: Best Practices

Although every company is structured and staffed differently, you will want to clearly identify who in your company fills each of the roles below:

- Executive Owner/Decision Maker
- Administrative Owner
- Technical Owner
- Marketing Resources

Executive Owner / Decision Maker

This could be the CEO, CMO, CXO and/or CIO – the person or people who are the key decision makers and contract owners, setting the company-wide strategic vision for marketing and sales outcomes.

Administrative Owner

Generally, the most senior individual in the marketing org, who will design and execute the experience with internal stakeholders to the end goal of meeting the overall organization directives.

Technical Owner

Partners with Administrative Owner on aligning technical resources to support the Total Expert platform, security, data and integrations. Leverages team members such as Business Analysts or System Administrators to determine and implement specifications and connections to other elements of the technology ecosystem.

Marketing Resources:

- **Marketing Content:** Drives content strategy, manages the editorial calendar and ad hoc marketing content.
- **Marketing Operations:**
 - Engagement – Develops messaging and momentum around purpose and benefits of new technology.
 - Training – Define and execute training plan and supporting materials.
 - Data Management – Executes data strategy for all sources
 - Marketing Deployment – Assigns available marketing to Marketing Coordinators

PLAYBOOK 2

Let's Get Started

Now that you have hopefully taken the time to think about how you may need to structure your team, we wanted to give you an overview of what you can expect as you are about to kick off your onboarding experience.

Implementation Manager

Your Implementation Manager will arrange a kickoff call with all stakeholders and commence work with you to set up your company's organization in the Total Expert platform. This includes:

- Establishing a project plan and timeline.
- Acting as the internal quarterback to coordinate resources.
- Consulting on best practices.
- Providing daily support for questions and decision making.

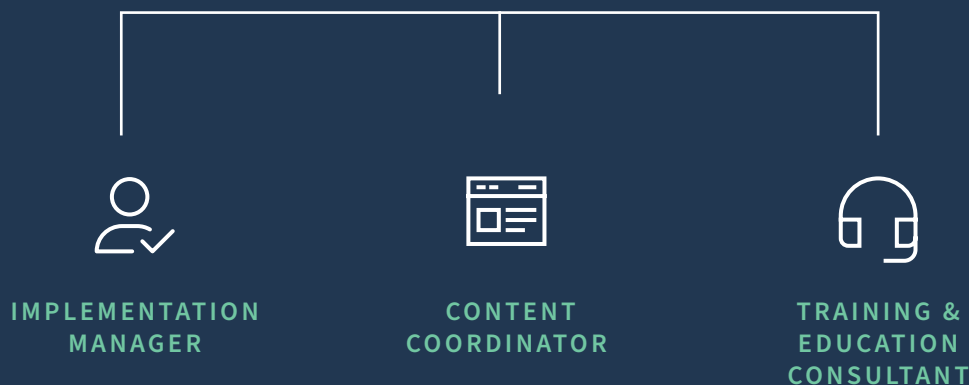
Content Coordinator

Your Content Coordinator will get to work helping you create your company's own custom content library across print, social, and email. Your Content Coordinator will also work closely with your team and provide many best practices in creating your own custom library (branding, disclaimers, fonts, colors, etc.).

Training and Education Consultant

Your Training & Education Consultant will get started right away training your Marketing Administrators on best practices and how to be successful in utilizing the Total Expert platform to leverage its' robust functionality. When you are getting closer to go live, they will also provide key trainings for your End Users.

IMPLEMENTATION TEAM



Trainings Available During Implementation:

Marketing Admin Training:

During weeks 1, 2, and 3, Marketing Administrators will be trained on the initial administration of Total Expert, as well as media, emails, and campaigns. Later in the project, Administrators will attend Advanced Administration Training to cover modifying and creating journeys. All Marketing Administrator training is held via webinar, recorded, and distributed to the customer team.

Best Practices Note: If a new administrator joins your team, they will be provided with these recordings as well as access to our library of ongoing training. We also are happy to create a customized individual training package for a reduced cost, which has proven to be a smart investment.

End User Training:

Near or at go-live, our team will conduct End User training on the CRM and marketing capabilities of Total Expert.



WHAT YOU CAN EXPECT DURING IMPLEMENTATION:

- Customized project plan, weekly status calls, and executive reporting dashboard.
- Organization setup, configuration and platform brand customization.
- Data mapping best practices, guides, and templates.
- Integration set up.
- Expert Content delivery and customization.
- User import.
- Email domain mapping.
- Historical data imports.
- Custom marketing content loaded.
- Customized automated campaigns.
- Customized communication and support plan.
- Marketing Admin training / End user training / Onsite training (if applicable).

Implementation Timeline

Timelines and expectations will be set in partnership with you and may vary from the foundational timeline shown below.

WEEKS 1-4



Foundations

Organization creation, user imports, Expert Content library, data mapping, campaign planning

WEEKS 5-12



Build

Custom content library, data synchronization, contact and loan import, admin training, campaign set up

WEEKS 13+



Rollout

Pilot group launch, full user rollout, ongoing support

FUTURE



Post Go Live

Transition period to CSM, ongoing feature rollout, supplemental training

TRANSITION TO CUSTOMER SUCCESS:

Once you have begun your full rollout, you will begin to make the transition to the Customer Success team — we call this the 30-day transition period. During this time, you will be introduced to your Customer Success Manager (CSM) who has been following your progress and knows what success looks like for you. Within 30 days, you should be fully transitioned to the customer success team.

“We can’t wait to kick off your journey with Total Expert. You have an amazing onboarding team standing by who is dedicated to your success as an organization and committed to providing you with an exceptional onboarding experience”



HEIDE ANTHOLZ,
TOTAL EXPERT
SVP OF PROFESSIONAL SERVICES



PLAYBOOK 3

Your Journey with Total Expert

After your implementation is complete, you will begin working closely with the team members who will support you throughout our relationship, including: Customer Success, Customer Support, Training and Education, Content Services, and Customer Engagement.

Customer Success

You will have a Customer Success Manager who will be your advocate and voice within Total Expert. Your Customer Success Manager will nurture the relationship by:

- Understanding your goals and reporting on ROI.
- Measuring and reporting on progress toward achieving definition of success over time.
- Offering best practices and optimization to maximize outcomes.
- Configuring new functionality and features.

- Partnering to improve on strengths, eliminate inefficiencies, and maximize productivity.
- Driving user adoption, engagement, and success.
- Maintaining awareness of technical and support cases to spot trends, offer training suggestions, and seek to prevent issues before they happen.
- Adding additional licenses and bringing awareness of new offerings.
- Serving as an advocate, liaison, and main point of contact within Total Expert.

Customer Support

We provide the most extensive, complete customer support for our customers and users available. You and your team will have live, local, chat-based customer support available 6 days a week for questions or troubleshooting. We do offer additional support via email and phone when needed, but in-platform chat allows us to provide the most speed, effectiveness, and efficiency in our responsiveness to you.

CUSTOMER SUCCESS



“Customer success is not just about one department; it is about the whole organization coming together to ensure a one-of-a-kind customer experience”



SUE WOODARD,
TOTAL EXPERT
CHIEF CUSTOMER OFFICER

Best Practice: When you have a question or need, always start with our support team first to see if they can help. They are knowledgeable about your configuration, and this team of highly experienced support agents are standing by waiting to hear from you! If your question or need requires connection with another department within Total Expert, they can easily transfer your question to be addressed or triaged by your Customer Success Manager.

Training & Education

We offer many free open enrollment sessions, designed to expand your knowledge and continue your learning, ultimately helping you to grow your business. Additionally, we offer several webinars to help you onboard new employees to the Total Expert Marketing Operating System® (MOS). These sessions are open to anyone and they can register at <https://totalexpert.com/training-and-education/>

Content Coordinator

Although you are now transitioned to the Customer Success team, your Content Coordinator will continue to work closely with you on your marketing content needs within the platform, helping to maintain your company's custom content library and brand integrity.

Customer Engagement

Our Customer Engagement team is focused on helping you and your team drive engagement with known best practices, resulting in measurable outcomes. They will provide resources and insights designed to help your team optimize engagement.

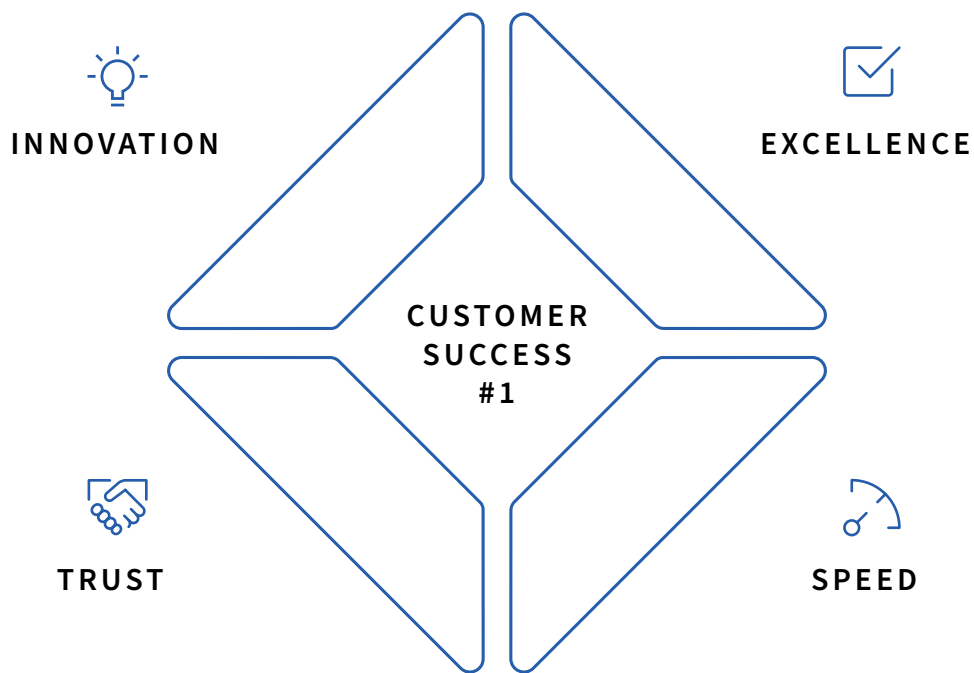
WHAT TO EXPECT DURING YOUR CUSTOMER JOURNEY:

- **Dedicated team assigned to support and drive your success and ROI.**
- **Live, local, expert support agents available 6 days a week.**
- **New training sessions every month:**
 - Best Practices for End Users.
 - Admin/Marketer Best Practices.
 - Feature Spotlight.
- **Quarterly Executive Summary.**
- **Participation and support at sales rallies / kickoffs / conferences.**
- **Opportunities for thought leadership, speaking, industry exposure.**
- **Exclusive invitation to Total Expert customer-only events.**
- **Monthly Total Expert news and updates.**
- **Success Planning:**
 - Review success plan.
 - Usage, metrics.
 - CSAT, NPS.
 - Best practices recommendations.
- **Executive Business Review:**
 - Strategic alignment.
 - Usage and metrics.
 - Roadmap highlights.
 - Best practices recommendations.
- **Expert Content**
 - Library of pre-built assets: print materials, social, email campaigns.
 - Ongoing expansion and development of expert content library
- **Access to executive sponsor at Total Expert**

PLAYBOOK 4

Total Expert Family Values

Here at Total Expert, we operate with five core values:



“At Total Expert, **Customer Success is our #1 priority**, and we are dedicated to not only meeting, but exceeding your definition of success”



JOE WELU,
TOTAL EXPERT
FOUNDER & CEO

Every single day, we are looking for opportunities to level up the customer experience and push the limits of what's possible.

Every interaction with a customer can either build or erode trust – and we take that seriously. We want to fuel your growth by creating more opportunities that deliver a great experience for your customers, ultimately building trust, loyalty, and customers for life.

We are focused on your success and providing you a best-in-class experience, and we thank you for entrusting us as your partner for the journey.

Sincerely,

A handwritten signature in blue ink, appearing to be 'JW'.

Joe Welu, Founder & CEO

