

Creating the Most Complete Technology Ecosystem for Modern Financial Institutions

Total Expert and Capacity partner to provide AI-driven sales productivity



Make room for Capacity

Capacity is the industry leader in AI-driven automation and workflows. With over 1,800 customers, more than 10 patents, and deep financial services expertise, Capacity helps modern banks, credit unions, lenders, and insurers boost sales productivity with turnkey solutions that scale with your business and your customers' needs, and remains the most secure and compliant AI platform in the market.

Knowledge shared. Loyalty earned.

Capacity's AI assistant indexes every piece of content in your knowledge base and key modules within the Total Expert platform. By fully integrating with Total Expert, Capacity can guide users to the right information whenever they have a question, need to find a resource, or want help troubleshooting an issue.

“We are eliminating the non-revenue generating tasks by automating them with Capacity, so our team has more time to focus on revenue generating activities. The goal is to create a single source to access everything to make our employees' lives easier.”

– Assurance Financial

Modern financial institutions are constantly seeking new and innovative ways to drive productivity for their relationship managers and marketing teams. But juggling a wide array of specialized technology platforms and digital solutions is an ongoing challenge; one that leads to low adoption rates for CRMs and marketing automation and customer engagement tools.

If your teams aren't taking advantage of these powerful platforms, your business can't provide the consistent, personalized experience that customers deserve at every stage of their financial journey.

Utilizing AI to source the right content and capabilities, within the Total Expert Platform, will improve the experience for relationship managers, relieve the burden on marketers who support the field, and deliver better customer outcomes for your business and your customers and in turn, lowering office costs and creating cost efficiency.