



Co-Marketing Partner Engagement Emails

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Overview of Co-Marketing Partner Emails

The following seven emails have been loaded into your Expert Content email gallery. Use the pre-built emails to help your loan officers engage with their agents and teach them how to leverage the platform.

#1 Co-Marketing Partner Email: Intro to Co-Marketing on Total Expert

This email is intended to be sent from a loan officer to a potential co-marketing partner explaining the benefits of leveraging the Total Expert platform along with a helpful overview video.

Subject line: Co-Marketing in Total Expert

Hi {{recipient.f_name}}!

I currently use a platform called Total Expert for my CRM and marketing. The platform provides me with the ability to offer you a complimentary Total Expert account. The platform would provide you access to the following tools:

- Lead Management / CRM
- Open house flyers and other print content
- Single Property Websites
- Lead Capture Apps
- And more!

Below is a link to a short, two-minute video with more details. If you're interested in leveraging the platform, let me know, and I'll send you an invitation.

If you have any questions, don't hesitate to reach out.



Link: <https://totalexpert.wistia.com/medias/e35j3aq879>

#2 Co-Marketing Partner Email: Creating Your Account

This email is intended to be sent from a loan officer if a co-marketing partner expresses interest in using the platform. The loan officer should first send the official invite via the platform and then follow up with this email to show them how to properly set up their account.

Subject line: Set-up your Total Expert account

Hi {{recipient.f_name}}!

Once you receive the co-marketing invitation email, it's extremely easy to set up your account in Total Expert. Within a few minutes, you will have your own access to the platform and can start leveraging the library of CRM and marketing tools.

The video below will show you step-by-step how quick and easy it is to create your account. If you have any questions, don't hesitate to reach out!

Link: Agent Tutorial: https://www.youtube.com/watch?v=CIF6B-ALMvk&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&i

#3 Co-Marketing Partner Email: Overview of Your Total Expert Account

This email is intended to be sent from the loan officer to the co-marketing partner once they have created their Total Expert account. The short video included in the email provides an introduction to the platform and teaches them how to use the features.

Subject line: Learn how to leverage your Total Expert account

Hi {{recipient.f_name}},

Once you create your account in Total Expert, there are a few things you will want to know as you start using the tool. Click the link below to watch a short introductory video that will teach you about the most impactful features you can start using right away.

If you have any questions, don't hesitate to reach out!

Link: Agent Tutorial: https://www.youtube.com/watch?v=ovFQzdpBdl0&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=2

#4 Co-Marketing Partner Email: Lead Capture Apps

This email is intended to be sent from the loan officer to their co-marketing partner to teach them how to create a Lead Capture App in their Total Expert account.

Subject line: Creating Lead Capture Apps in Total Expert

Hi {{recipient.f_name}}!



The Total Expert platform provides you with access to Lead Capture Apps. A Lead Capture App is an electronic lead form that streamlines the sign-in process for live events, captures contact information instantly, and seamlessly automates your follow-up tasks.

Check out the quick tutorial below on how to create an Open House Lead Capture App in Total Expert. If you have any questions, let me know!

Link: Agent Tutorial: https://www.youtube.com/watch?v=ZS-OcMXgfzo&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=6

#5 Co-Marketing Partner Email: Single Property Website

This email is intended to be sent from the loan officer to their co-marketing partner to teach them how to create a Single Property Site in their Total Expert account.

Subject line: Creating a Single Property Website in Total Expert

Hi {{recipient.f_name}}!

Total Expert provides you with Single Property Website templates so you can attract and engage homebuyers with individual websites for your listings. These landing pages are easy to create and will supplement and enhance your current digital marketing efforts.

The tutorial below will walk you through the process for creating a new Single Property Website in Total Expert. Check it out and let me know if you have any questions.

Link: Agent Tutorial: https://www.youtube.com/watch?v=OMhKf06KMZY&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=5

#6 Co-Marketing Partner Email: Combined Dashboards

This email is intended to be sent from the loan officer to their co-marketing partner to teach them how to leverage the combined dashboard feature in their Total Expert account.

Subject line: Start leveraging the co-marketing combined dashboard in Total Expert

Hi {{recipient.f_name}},

Within your Total Expert account, you'll see a combined dashboard with links to me and your other co-marketing partners. This dashboard will highlight all of our shared leads and marketing materials so you can quickly review the leads you're sharing with each partner.

Click on the video below to locate and leverage the dashboard in the platform. Let me know if you have any questions.

Link: Agent Tutorial: https://www.youtube.com/watch?v=xLDlrKL119I&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=4



#7 Co-Marketing Partner Email: Co-Branded Print Marketing

This email is intended to be sent from the loan officer to their co-marketing partner to show them how to create co-branded marketing resources in Total Expert.

Subject line: Co-branded print marketing in Total Expert

Hi {{recipient.f_name}}!

One of the perks of your Total Expert account is having a pre-built library of print marketing resources you can quickly customize and share. Some of the most popular print marketing assets available are print flyers, property detail infographics, and direct mail postcards. They're professionally designed, easy to create and essential to building your brand.

Watch the five-minute tutorial below to learn how to create your own print materials. Let me know if you have any questions.

Link: Agent Tutorial:

https://www.youtube.com/watch?v=Zns6KM_VxUk&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=7

Best practices for leveraging the Co-Marketing Partner emails

- Instruct loan officers to manually send out email #1 (Invite to Co-Marketing on Total Expert) and email #2 (Creating Your Account) when it makes the most sense:
 - **#1 Co-Marketing Partner Email: Invite to Co-Market on Total Expert** should be the first email a loan officer sends when they have a potential co-marketing partner. If the agent is interested in Total Expert after reading this email, the loan officer should then send the actual Co-Marketing invitation via Total Expert.
 - The loan officer can then review the email stats on this email to see if the agent opened or clicked the email
 - **#2 Co-Marketing Partner Email: Creating Your Account** should be sent directly after the loan officer sends the actual co-marketing invitation via the platform. This email instructs them on how to properly set up their account.
- Create a Co-Marketing Partner journey with the additional five emails:
 - #3 Co-Marketing Partner Emails: Overview of Your Total Expert Account
 - #4 Co-Marketing Partner Email: Lead Capture Apps
 - #5 Co-Marketing Partner Email: Single Property Website
 - #6 Co-Marketing Partner Email: Combined Dashboards
 - #7 Co-Marketing Partner Email: Co-Branded Print Marketing
- Instruct loan officers to add the agent to the Co-Marketing Partner journey in their account once they officially become a co-marketing partner
 - On-ramp: manually add contact
 - Leverage timer delays to spread out the email content
 - Add a notification or task at the end of the journey to instruct the loan officer to follow up with the agent and see if they have any additional questions or would like to meet.