Branch Manager Best Practices

This document outlines best practices for Branch Managers who have a team in Total Expert. There are two different sections, the first identifies two best practices to communicate with your team about Total Expert and the second outlines strategies for reviewing your teams' usage of the platform and ways you can promote higher adoption.

Best Practices For Marketing and Communication

(Over) communicate with your team about Total Expert updates and news

- Relay information and communications from your marketing team
- Create a marketing section in your standing team calls where you highlight marketing/Total Expert updates, upcoming training, and event

Use the Total Expert platform to send out weekly/monthly encouragements to your team via BombBomb or Vidyard

- Pick a consistent time and cadence for your email send (maybe the first Monday of every week or month)
- Log in to Total Expert and create a manual email using the video email template
- Record your BombBomb / Vidyard video
- Send an email to your team using your team's group in Total Expert

Note

Your team members must be added as contacts in the system, not just users. We recommend creating each team member as a contact is Total Expert and then adding them to a group to keep those contacts separate from clients and to easily communicate with them. If you need help with this, consult with your marketing team.

Warning

You must have a BombBomb or Vidyard account to send videos out of the platform. **If you don't already have an account for either of these systems, you can sign up for a free Vidyard account directly in the platform.**

Best Practices for Reviewing Your Teams' Adoption of the Platform

Review the Marketing Overview Report in Total Expert

How to export the report:

- Log into your Total Expert account > reporting and analytics > marketing overview report
- Filter by time frame (1st of the month to the last day of the month) and select your team using the blue filter button shown below

- Add the contacts column to the report by using the add columns button shown below
- Export the report

How to filter the report:

- Filter your report as a table
- Review the data in the following categories
  - Logins
  - Contacts
  - Connections Sent
  - Connections Accepted
  - Emails Sent
  - Approved Social Media
  - Active Sites
  - Active Landing Pages
  - Print Downloads

How to take appropriate action:

- Logins:
  - If logins are less than 5 in that month, encourage the user to attend monthly trainings, reach out to the marketing team for additional training, and/or send resources from the Training Resources Center to the user for additional support
- Contacts:
  - If the user hasn't taken in a new lead / new agent relationship in the last month, reach out to have a conversation with that user to understand why they don't have any new contacts
- Connections Sent / Connections Accepted:
  - If connections accepted is less than 3, come up with a strategy to target their top 5 agents and get them to become co-marketing partners
- Emails Sent:
  - If emails sent are lower than 50 in the last month, have a conversation with those users
    - Ask why? How are they currently communicating?
    - Review Journeys and encourage them to turn on Journeys*
- Approved Social Media:
  - If approved social media is less than 2, have a conversation with the user around their social media strategy and when/what they are posting
  - Encourage users to use social media to promote their personal / company brand
- Active Sites / Active Landing Pages / Print Downloads
  - If any of these numbers are 0, encourage users to attend training or reach out to the marketing team for additional training, and/or send resources from the Training Resources Center to the user for additional support

Review your team members' dashboard in Total Expert

- Spoof into each of your team members' accounts and locate their dashboard [how to spoof in>]
- Review their open tasks dashboard tile
  - If they have over 3 open tasks, reach out to make sure they are taking action on Journey tasks
- Review new contacts on the dashboard tile
  - If they have over 3 new contacts, reach out to make sure they have a strategy for reaching out to these individuals

Note

Meet with each loan officer on your team to determine which dashboard tile is most impactful to them and their business. Help them strategize the best way to action off that tile in their day-to-day business plan.

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