



Co-Marketing Playbook: Three Steps to Building Successful Partnerships

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Step 1: Call or email your agent prior to sending them an invite to Total Expert

Make sure to include the Total Expert value prop for agents in your messaging:

- Make sure to include the Total Expert value prop for agents in your messaging:
- Agents get a free version of Total Expert, which includes:
- CRM and lead management
- Marketing tools such as Single Property Sites, Lead Capture Apps, Print Marketing, and Every Door Direct Mail

Best Practices:

- Create a strategy for how often and how many agents you are going to target
 - Pick 1 day a week (1 hr) where you are going to send out 2-3 emails/calls to agents
 - Start with your top list of agents (5) and get them fully connected first before you start sending out more invites
 - Get face to face with your agents
 - Create yourself as a contact in Total Expert and send yourself a co-marketing invitation
 - Accept the invitation so you understand the agent's experience and unlock the ability to create listing flyers, print marketing flyers, etc.



- Create a sample Co-Marketing Kit to showcase to your agents (LCA, SPS, listing flyer)

Help Resources:

- [Promo video to share with agents](#)
- One pagers:
 - [Benefits of Total Expert](#)
 - [Lead Capture Apps](#)
 - [Lead Management](#)
 - [Print Marketing](#)
 - [Single Property Websites](#)
 - [FAQ](#)

Example email:

“Hi [Agent First Name],

I currently use a platform called Total Expert for my CRM and marketing. I have the ability to extend an invitation that would offer you a free Total Expert account. This 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!

I would love for you to be able to leverage this technology. Let me know if you're interested and I can send you an invitation. In the meantime, [here is a quick video](#) if you want to learn more!

Step 2: If your agent expresses interest, send them a co-marketing invitation via Total Expert

Once you have made contact with the agent, send the Co-Marketing invitation.

Best Practices:

- Do not send out mass co-marketing invitations (unless it is after a lunch ‘n’ learn or event”)
- Our best practice is to fill out as much information as you can for the agent before sending the invitation to make it as easy as possible for your agent to sign up.
- Make a task reminder to check back in a few days on the status of their invitation
- Follow up with the agent if there is no engagement
- Important things to note:
 - The MLS Agent ID is the most important for asset creation (you can add this in before you send the invitation)
 - Agents can give you access to change edit the rest of their profile
 - If you have a connected partner, you will get listing notifications any time one of their properties hits the market



- Must have your Co-Marketed New Listing Email Notifications turned on to receive

Helpful resources:

- [How to invite a CMP](#)
- [Reviewing the status of a CMP](#)
- [Co-Marketing Partner training course](#)

Step 3: Show your agent the value of Total Expert

Best Practices:

- Ensure your **Co-Marketed New Listing Alerts** are turned ON in your account settings > notification settings
 - Not sure how? Click [here](#) to learn how to update your notification settings
- Each time you get a listing alert email, proactively create a co-marketing resources for them and email them to the agent:
 - Single Property Website
 - Lead Capture App
 - Print Flyer
 - Share Single Property Website on social media and tag the agent
 - Show agents that they also have access to create SPS, LCA, and print marketing content

Help Resources:

- [Engagement video: single property websites](#)
- [Creating a single property website](#)
- [Posting a single property website to social media](#)
- [Posting content to social](#)
- [Engagement video: lead capture apps](#)
- [Creating a co-branded print flyer](#)
- [Creating a dynamic rate flyer](#)
- [Dynamic rate flyer](#)

Example email:

“Hi [Agent First Name],

I saw that your property at [property address] just hit the market – congratulations! I went ahead and created some marketing resources for you to use to promote your property. See below:

- Single Property Website (insert link)
- Open House Lead Capture App (insert link)
- Print flyer (attach to email)

Again, congrats on your new listing! Let me know if I can help you in any other way“