



New Co-Marketing Partner Engagement Journey / Emails

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New 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: MLS Agent ID

This email is for the loan officer to send to the co-marketing partner after they've created their Total Expert account, ensuring they've added their MLS Agent ID to their profile to display their MLS listings.

Subject line: How to Add Your MLS Agent ID to Your Total Expert Account

Hi {{recipient.f_name}}!

Adding your MLS Agent ID to your Total Expert profile is essential to ensure your listings automatically populate in the system so you can easily create marketing collateral. If you didn't enter your MLS Agent ID when setting up your account, you can easily add it by following a few simple steps.

Watch the quick tutorial below to learn how to access your MLS/IDX settings, and feel free to reach out with any questions!

Link: Agent Tutorial:

https://www.youtube.com/watch?v=IZPHnNMPFD0&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=8

#5 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-OcMXgfo&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=6

#6 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

#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

#8 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



#9 Co-Marketing Partner Email: Uploading Your Database

This email is intended to be sent from the loan officer to the co-marketing partner to instruct them on how to upload their database to Total Expert through the customer support portal.

Subject line: Uploading Your Database to Total Expert

Hi {{recipient.f_name}}!

If you want to use Total Expert to manage your entire database, you can leverage Total Expert's support team to upload your database to the platform. Click [here](#) to get started or watch the quick video below to learn more!

Link: Agent Tutorial:

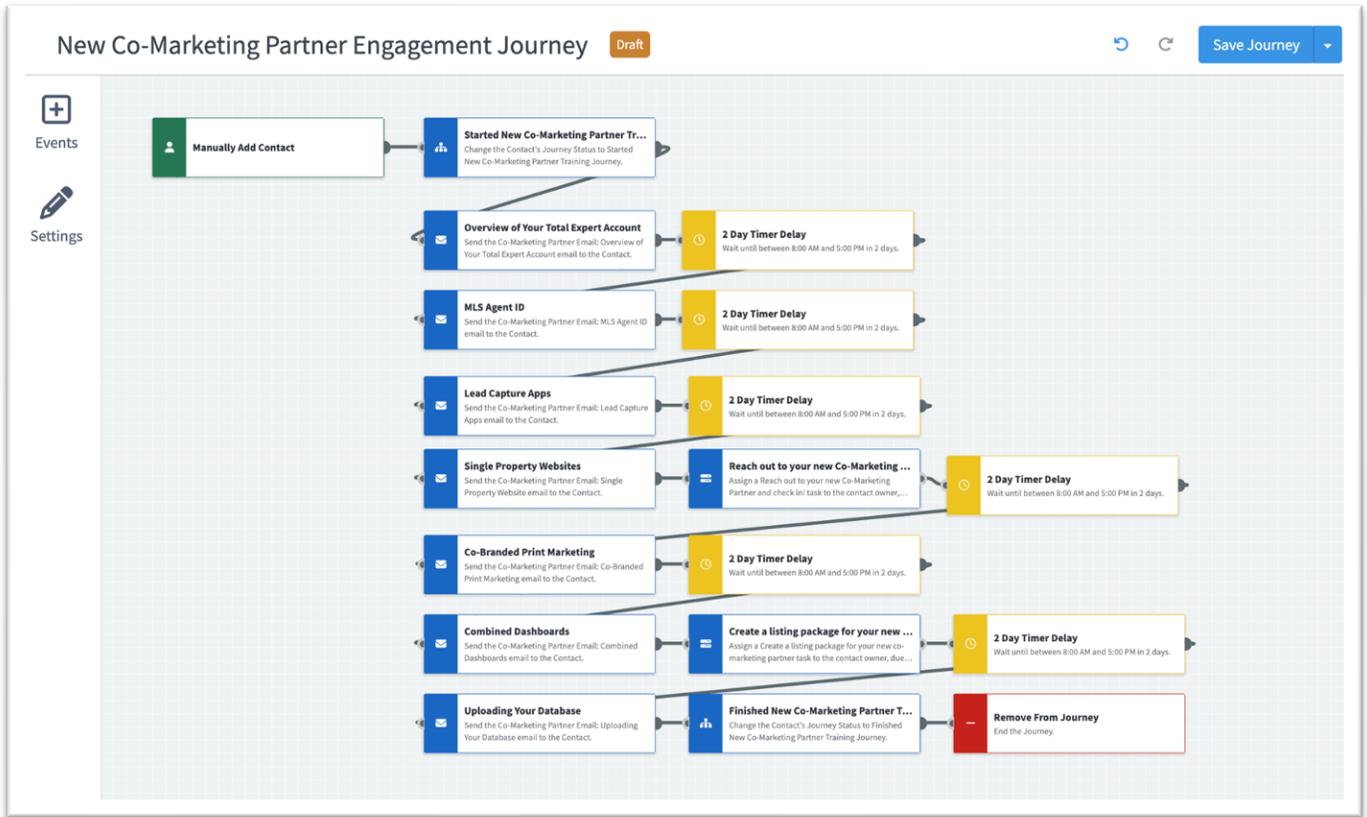
https://www.youtube.com/watch?v=wyklzqmaK3U&list=PLpz72tceZ3walfVHYmDn1LnUUTq_Qj_Bh&index=9

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.
- Leverage the New Co-Marketing Partner Training Journey to automate the additional seven email (see Journey overview below)
 - #3 Co-Marketing Partner Emails: Overview of Your Total Expert Account
 - #4 Co-Marketing Partner Emails: MLS Agent ID
 - #5 Co-Marketing Partner Email: Lead Capture Apps
 - #6 Co-Marketing Partner Email: Single Property Website
 - #7 Co-Marketing Partner Email: Co-Branded Print Marketing
 - #8 Co-Marketing Partner Email: Combined Dashboards
 - #9 Co-Marketing Partner Email: Uploading Your Database
- Instruct loan officers to add the agent to the New 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.



New Co-Marketing Partner Engagement Journey



Journey Overview

This Journey includes seven of the nine pre-built Co-Marketing Partner emails and two follow-up tasks for the end user. The goal of this Journey is to help end users easily engage their Co-Marketing Partners once they accept the invitation to co-market within Total Expert.

Journey Customization

Emails

- You can re-arrange the order of the emails and add/delete any content you wish, or that doesn't make sense for your organization. The seven pre-built emails included in the Journey are:
 - Overview of Your Total Expert Account
 - MLS Agent ID
 - Lead Capture Apps
 - Single Property Websites
 - Co-Branded Print Marketing
 - Combined Dashboards
 - Uploading Your Database
- If you do not want to use the pre-built training videos, you can create customized videos to replace the pre-built videos.
- Edit the timer delays to the Journey cadence you desire.



Tasks

- There are two tasks for the end user in this Journey:
 - 1st task: This task is delivered at the halfway point of this Journey, and it instructs the end user to check in with the new Co-Marketing Partner to see if they have any questions about the system.
 - 2nd task: This task is delivered at the end of this Journey, and it instructs the end user to create a listing package (SPS, LCA, Co-Branded print resource) for the new agent to show them the platform in action.
- Edit the tasks to make sense for your organization.

End User Enablement

Once you activate the Journey for your end users, be sure that you train them on how to use the Journey. Leverage the best practices below.

Best Practices for Training

- Instruct end users on when and how to manually add their agent contact to this Journey.
 - End users should ideally be adding new Co-Marketing Partners to this Journey once they accept their invitation and have access to their account.
- Remind your end users how to use tasks and how to mark their tasks complete in the platform.
 - Encourage them to make sure they have their task notifications turned on in their notification settings.
- Train your end users on what to do when they receive the two tasks within the Journey.
 - Task #1: End users should call their agent to check-in.
 - If agents are struggling or have questions, encourage your end users to set up a meeting with the agent.
 - Task #2: End Users should select one of the agent's properties and create a listing package.
 - Remind your end users how to create each of these resources.
 - You may recommend which resources they use for this type of package.
 - You might consider publishing the Expert Content new listing kit email template (EC: New Listing kit) to your end users so that they can easily send the links to the listing package to their new Co-Marketing Partner.