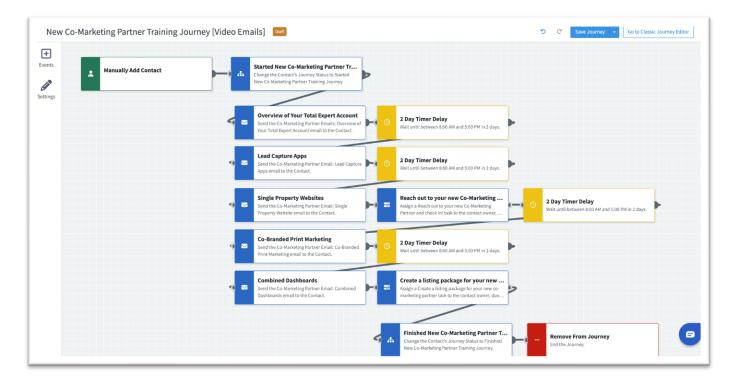
New Co-Marketing Partner Training Journey [Video Emails]



Journey Overview

This Journey includes five of the seven 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.

Note

If you would like to view all of the Co-Marketing Partner Engagement Emails, locate the 'Co-Marketing Partner Engagement Emails' help resource in the Knowledge Base.

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 five pre-built emails included in the Journey are:
 - Overview of Your Total Expert Account
 - Lead Capture Apps
 - Single Property Websites
 - o Co-Branded Print Marketing

- Combined Dashboards
- If you do not want to use the pre-built training videos, you can create customized videos to replace the prebuilt 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.
 - \circ 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.