



# New Co-Marketing Partner Training Journey [Video Emails]



TOTAL EXPERT

## 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
  - 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 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:
  - 1<sup>st</sup> 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.
  - 2<sup>nd</sup> 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.