



# ***Presentation Guide: Connecting with a Co-Marketing Partner***

In this session, marketing administrators will train their end users on how to connect with a Co-Marketing partner that will enable users to collaborate by sharing contacts, creating co-branded content, and much more!

## **POWERPOINT**

### **Agenda**

- Functionality overview
- How this helps you win
- In-platform training
- Best practices
- Your next steps!

### **Benefits of Co-Marketing**

- Total Expert is available to every real estate agent and anyone in financial services.
- Invite co-marketing partners directly from the platform.
- Partners have access to a free version of Total Expert that is RESPA compliant (paid upgrades available).
- Ability to track relationships and marketing materials created.
- Helps make the asset creation process easy and efficient.

### **How This Helps You Win**

- Access to attractive marketing materials – connecting to co-marketing partners allows users to leverage co-branded content.
- Generate low-cost, high-quality leads – by leveraging lead capture apps, co-branded content, and lead sharing with co-marketing partners within the platform.
- Increase brand recognition.



## In-Platform Training

\*Before you begin - assist and guide users with the login process based off your organization's login method\*

### How to Add a Contact

- To invite a co-marketing partner to Total Expert, they must be a contact first.
- Click on the plus sign (+) at the very top right of the page
  - Click Create Contact
  - On the left - review the various fields users can enter in about their contact. The more fields entered in now about the contact, the less they will have to do to complete their profile.
  - Scroll down a little further. Still on the right side – point out ability to add general notes. Back on the left side – point out the ability to add the contact to groups.
  - Click Save back at the top left.

### How to Invite Co-Marketing Partners

- Within the navigation menu click on Leads and Contacts > Contacts.
- Select any contact by checking off the box to the left of their name.
- Click Actions at the top left.
- Click the “Invite to Co-Market” action.
- User can go in 1 of 2 directions from here:
  - (1) Create Invitation – this will bypass the profile creation process and go right into having the user send the email invitation to their co-marketing partner.
  - (2) Setup Profile – this allows the user to begin setting up their co-marketing partners profile, including contact information, headshot, MLS ID, etc.
- Click on Setup Profile:
  - Page 1: users allowed to verify contact information or type in any missing information.
    - Click Next
  - Page 2: MLS ID and Association. This is how the platform will automate your agents' listings directly into content.
    - Click Next
  - Page 3: Headshot and Logo Image
    - Click Next
  - Page 4: Send Email Invitation. Click Send Invitation.
- Alternate way to invite co-marketing partner: Click on the plus sign (+) at the very top right of the page, select “Add Connection.” No need to go through full demonstration, just let users know there are 2 ways to access the email invitation.



## How to Monitor the Status of Co-Marketing Partner Invitations

- To monitor the status of their invitation, click on the Co-Marketing Partners tab.
  - Note the Status column.
  - Status will be listed as Pending until the email invitation has been accepted. Users can track whether the email has been:
    - Delivered
    - Not Delivered
    - Opened
    - Invitation Link Clicked
  - Once the email invitation has been accepted, the status will change to Active.
  - On the right-side, users will be able to track their co-marketing partners profile completion.

## How to Manage Co-Marketing Partners Relationships

- Users have visibility to into data to help track the effectiveness of their relationship.
- From the Co-Marketing Partners page, click on the name of any Active co-marketing partner and walk through the following:
  - On the left side – basic information about the co-marketing partner and a history of co-branded content that has been created with that individual.
  - On the right side – lead sharing information regarding the amount of leads and shared and from which specific sources.
  - On the bottom – a list of all leads shared back in forth between the user and their co-marketing partner.
- Click back or click on the Co-Marketing Partners tab within the navigation menu.
- Click on the Actions button to the left of a co-marketing partner:
  - Edit: allows for users to edit contact information of their co-marketing partner.
  - Delete: allows for users to delete and stop their co-marketing partner connection if they feel the collaboration in the platform is no longer necessary.

## **Back to POWERPOINT**

### Best Practices

- Create a contact – make sure co-marketing partners are a contact first before inviting them!
- Have a conversation – connect with your co-marketing partner to discuss the value and benefits of collaborating in Total Expert. Recommend leveraging the “Benefits of Co-Marketing” document.
- Complete their profile for them – accelerate the process by completing your co-marketing partner’s profile.



- Meet in person – if possible (and safe), suggest meeting in-person to show the technical side and the value of the platform.
- Create a marketing kit – when your co-marketing partners needs help with their listings, create co-branded content they can promote.
- Continually evaluate effectiveness of partnership – monitor your relationship and collaboration with each co-marketing partner in the platform.

## Going Forward from Here

- For adoption and retention purposes – encourage your audience to access supporting documents, videos, and resources and demonstrate where they can access our Help Center within the platform, as well as reaching out to our Product Support team.