



Creative Ways to Engage Loan Officers and Their Referral Partners

This best practice document is a compilation of the direct output from the *Light the Engagement Fire* breakout session at Accelerate 2023. All of the ideas listed below are best practices promoted by administrators of the Total Expert platform. A ☆ denotes a top idea!

What have been your most successful strategies for driving loan officer adoption of technology?

- Branch manager partnership and influence ☆
 - Hosting Branch Manager training sessions, live and in-person
- Creating a Youtube channel within your corporate Youtube channel to host short, 2-minute instructional videos by topic ☆
- Developing a top users leaderboard and sharing it out amongst sales team (most emails, co-marketing connections, SPS's etc.) ☆
- Leveraging top producers to champion the TE platform ☆
 - Get top producers to share their success stories on sales team call
- Creating a pilot team of users that consists of one person from each region to adopt any new rollouts or be a sounding board for the sales team ☆
- Compensate a platform fee if end users complete their monthly challenges and/or training courses ☆
 - Ie. For the first six months, the platform is free for all end users. After six months, if the end user completes their monthly challenges and training, they continue to get the platformed comped. If they do not complete the monthly requirements, the end user is charged
- Make Total Expert part of your company onboarding strategy ☆
 - Leverage the Onboarding Journey and customize to your organization
- Training
 - Training calendar with standing training (2x a month)
 - Weekly, quick learning sessions (15-30 min)
 - Regional marketing coordinators host classes, show how to use it, save the video to share out
 - Role-specific training (LO, LOA, BM)
- Quick hit videos on the company training platform
- Send monthly newsletter or email digest out of the platform that highlights:
 - Upcoming trainings
 - Links to recordings
 - Leaderboard and stats
 - New content
- Lean into detractors to turn them and educate them on the platform
- Executive team “sponsor” that will engage with the tech to be an example to the sales team
- Gamification: Incentivise end users to use the platform (ie. marketing “credits” to spend)



- Implement trial periods of features
- Leveraging BombBomb
- Man on the streets challenge: address a real-world issue and solve it using TE

What are some of the creative ways you are seeing your loan officers engage with real estate agents right now?

- Referral partner gifts / special surprises (surprise and delight) ☆
 - Agent and builder kits with all kinds of different tools they can use if they partner with the LO
 - Starbucks campaign for listing agents: pull a report of listing agents that were listed on a closed loan that previous month. Then send them a postcard or Starbucks coffee gift card as a thank you for doing business
 - Hand deliver presents to partners at holiday time
 - Set up niche product emails
- Create pre-packaged real estate agent presentations ☆
- Hosting lunch and learns: ☆
 - Include a special speaker to enhance the value
 - Pick a fun restaurant or location
 - Create an exclusive feel
 - First-time homebuyer workshops to debunk myths and build awareness
- Create a coaching department geared towards coaching LOs on how to give a presentation and partner with agents ☆
 - Host 20 classes and allow people to sign up
- Provide real estate agents a sign-up link to get a listing kit for their upcoming listings, and marketing will put together ☆
- Team up with an agent on Youtube and conduct educational sessions. Break up the content and post on Instagram, FB, Tik Tok, etc.
- Turn on co-marketing alerts, so end users are notified when one of their CMP's listings hits the MLS
- Communicate regularly with agents to demonstrate your marketing skills and trust
 - Send weekly/monthly newsletter to agents
 - Provide agents with updated content/collateral, anything that is newsworthy in their TE account
- “Building your brand” Journey for agents
- Use MMI to look at top-producing realtors and then target them to be their go-to lender and then pull them into the tech stack
- Go to open houses