



# Total Expert Bootcamp 2.0

## Journey: Marketing Admin Guide

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# Structure of Bootcamp

In the *Total Expert Bootcamp 2.0* Journey, there are 6 different modules. Each module follows a similar structure containing three emails:

1. Introduction to the module and topics covered.
2. Lesson #1 with corresponding activities and help resources included.
3. Lesson #2 with corresponding activities and help resources included.

## Module Outline

### Module 1: Set-up

Email 1: Welcome to Bootcamp  
Email 2: Profile complete / Notifications  
Email 3: Integrations check

### Module 2: Co-Marketing

Email 4: Overview of Co-Marketing  
Email 5: Co-marketing invites  
Email 6: Fully connecting agent accounts + co-marketed new listing alerts

### Module 3: Print Marketing

Email 7: Overview of rate and infographic  
Email 8: Print Marketing – property infographic  
Email 9: Rate Flyers

### Module 4: Web Marketing

Email 10: Overview of LCA and SPS (LCA training course)  
Email 11: Lead Capture App  
Email 12: How to Post SPS to Social Media

### Module 5: CRM

Email 13: Overview + FV course  
Email 14: Focused View  
Email 15: Daily Digest

### Module 6:

Email 16: Emails and Email Stats  
Email 17: BombBomb  
Email 18: End of Bootcamp / Training Resource Center

#### Note

Each email in this Bootcamp Journey is separated by a “Date Delay”. Once you determine your start date for Bootcamp, adjust the date delays.

## Journey Email Copy

For easy review of the email content, we have included the email copy below for each of the Bootcamp 2.0 emails. This will allow you to review the emails outside of the platform, if you wish.



# Module 1

## Email 1

**Subject line:** Welcome to Bootcamp!

{{ recipient.f\_name }},

Welcome to ⚡ Total Expert Bootcamp ⚡ ! We are so excited you have committed to going on this journey with us.

Over the next six weeks you are going to learn strategies and best practices for many of Total Experts features. Starting today you will begin to receive a series of emails that will help you become familiar with the Total Expert platform and sharpen your skills. Each email will include an overview of a feature, an activity for you to complete, and help resources in case you get stuck.

Be sure to check your email daily and do not be afraid to ask questions if you have any. You can always click on the blue chat bubble in platform and a live agent will be available to assist you.

Be on the lookout for your first activity coming soon... you will be a Total Expert EXPERT in no time!

## Email 2

**Subject line:** Set Yourself Up for Success.

{{ recipient.f\_name }},

The first step in Bootcamp is to make sure that your profile is complete and that your notifications are turned on.

✅ Today's Activities ✅

- Ensure that your profile is complete and all the information is correct in Total Expert.
- Review your account settings (profile, contact information, notification settings, etc.)
- Check your marketing profile (image, social media platforms, etc.)

📄 Help Resources 📄

- [Account Settings](#) [Edit Profile](#) [Simulation](#)
- [Quick Account Set-Up Tutorial](#) (7 min)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Email 3

**Subject line:** Make the Most of Your Integrations

{{ recipient.f\_name }},

Your next step in Bootcamp is to ensure your integrations are all linked up and ready to go! You can check out the help resources below if you aren't sure how.



## ✔ Todays Activities ✔

- Review the available integrations by clicking your name in the top right corner and selecting integration settings.
- Connect the accounts you want synced up in the platform.

## 📄 Help Resources 📄

- [How to set up your integrations](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Module 2

### Email 4

**Subject line:** Power Partnerships!

{{ recipient.f\_name }},

Congrats on finishing the first module of Bootcamp! This next module will focus on teaching you about the **Power of Partnerships!** Why? Because we know that when your agents win, you win.

The ability to co-market is a huge benefit for you and their real estate agents and builders. Total Expert found that the loan officers who utilize Co-Marketing Partners (CMP) see:

- **43.9% more applications**
- **2.4x more loan volume (\$)**

Through Total Expert's MLS integration, you can easily collaborate with your Co-Marketing Partners on Single Property Websites, Lead Capture Apps, and Print Marketing. You can also share leads and manage contacts together.

This week, you will learn how to leverage the co-marketing functionality in Total Expert. Get yourself ready for the week by completing this quick co-marketing training course.

[Training Course](#)

### Email 5

**Subject line:** Creating Co-Marketing Partnerships

{{ recipient.f\_name }},

This week you will learn how to invite partners to Total Expert. What is a co-marketing partner? A partner can be anyone in financial services (i.e., agents, builders, financial planners, etc.). Once your partner accepts your invitation to Total Expert, you can collaborate and co-market together.

## ✔ Todays Activities ✔



- Create yourself as a contact in Total Expert and send yourself a co-marketing invitation
  - Accept the invitation so you understand the agent's experience and unlock the ability to create open house flyers and rate sheets, and infographics
- When you feel comfortable, send a co-marketing invite to one or more of your agents
  - Before you invite an agent to connect in Total Expert, send them a quick email or text message to give them a heads up
- Make sure you have your Co-Marketing listing alerts on so that you get notified when one of your connected agents has a new listing
  - Go into your account settings > notification settings and make sure you select "yes" to receive co-marketed new listing alerts.

#### Help Resources

- [How to send a co-marketing invite](#)
- [Video: Connecting with a Co-Marketing Partner](#) 11 min

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

#### *Email 6*

**Subject line:** Are Your Agents (FULLY) Connected?

{{ recipient.f\_name }},

It's time to check-in. Have your co-marketing invites been (fully) accepted? It is essential to check to make sure all your co-marketing partners have completely set up their profile in Total Expert – especially their MLS Agent ID. If an agent has not added their MLS Agent ID, you will not receive Co-Marketing Listing Alerts from the system and will not be notified when they have listed a new property.

#### Today's Activities

- Check on the status of your co-marketing partner invitations
- Ensure all your co-marketing partner profiles are complete to fully leverage these powerful partnerships.
  - If there are any partners whose profiles are not fully completed, call or send a follow-up email using the playbook below instructing them on how to do so and why

#### Best Practices

- [Co-Marketing Playbook: Three Steps to Building Successful Partnerships](#)
- [How to check on the status of your invitations](#)
- [What are the different co-marketing partner connection statuses?](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!



## Module 3

### Email 7

**Subject line:** All Things Print Marketing!

{{ recipient.f\_name }},

And just like that... two modules completed, four more until you reach EXPERT status. Keep up the excellent work!



With Total Expert, you have access to a robust print marketing library that includes everything from custom rate flyers, property infographics, direct mail postcards and more! This week you are going to learn how to create a custom rate flyer and a property infographic.

Before we dive in, watch this training video on print marketing to get you ready for the week.

[Print Marketing Training Video](#)

### Email 8

**Subject line:** Make the Most of Marketing

{{ recipient.f\_name }},

Print marketing materials are essential to building your brand and getting your face out there. It can help grow your business by allowing you to easily present marketing material to a wide range of customers and audience members through various delivery methods. In Total Expert, you have a robust print marketing library that you can easily access to create marketing collateral on demand...let's try it out!

#### Today's Activities

- Create a co-branded property Infographic for a new listing and send the PDF to your agent

#### Best Practices

- [How to create a property flyer - simulation](#)
- [How to build Co-Marketing print flyers video \(1 min\)](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

### Email 9

**Subject line:** Building Rate Flyers

{{ recipient.f\_name }},

Let's get real. How many times do you get asked by your agents to create a rate flyer for them? Answer is probably ... a lot.



With just a few clicks, you can create a beautiful, compliant custom rate flyer that showcases both the property and the potential loan programs.

☑️ Today's Activities ☑️

- Create a co-branded or single branded rate flyer
  - Print marketing > Create new > Select print asset > Actions > Select
  - If co-branded: select Co-Marketing Partner > Select pricing options

📄 Best Practices 📄

- [Building a rate flyer video](#) (1 min)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Module 4

*Email 10*

**Subject line:** Whoa, You're Halfway There!

{{ recipient.f\_name }},

Congrats! You have officially made it to the halfway point of Bootcamp.

In module four, we will show you how to distinguish yourself from the competition by utilizing easy, modern tools such as Lead Capture Apps and Single Property Websites. You will elevate your borrower experience and convert more leads.

Before we get started, take this quick course on Lead Capture Apps to help you get familiar with the tool.

[Course Link](#)

*Email 11*

**Subject line:** Never Miss a Lead.

{{ recipient.f\_name }},

Lead Capture Apps (LCA) provide a digital way to easily gather contacts, leads, and prospect information at events, open houses, webinars, or on social media. When someone fills out the Lead Capture App, their information flows directly into Total Expert and then you can easily follow up. You can also take advantage of many different template options to target different audiences and markets.

☑️ Today's Activities ☑️

- Create a co-branded open house LCA for one of your agents. Share the link with the agent partner.

📄 Help Resources 📄



- [Creating an open house registration form](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

### Email 12

**Subject line:** Post Your Listings to Social.

{{ recipient.f\_name }},

Did you know that property listings are THE most digested content on social media? According to the National Association of Realtors, 95% of home buyers search websites to find homes. With Total Expert, you can create beautifully branded property listing websites that you can share directly with your agents and even post on social media!

Our best practice is to create a Single Property Website every time you get a co-marketing new listing email. It is important to remember that if you are not receiving these, it is likely because the agent has not put in their MLS Agent ID. They must have their MLS Agent ID to receive these new listing emails.

#### ☑ Today's Activities ☑

- Log into your account and create a Single Property Site for one of your agents' listings (remember to "ADD" the agent to the contact info when creating the site)
- Post the Single Property Site that you created to all of your desired social media channels and tag the agent
- Share the link with the agent

#### 📄 Help Resources 📄

- [Creating a Single Property Website](#)
- [Posting a Single Property Website to Social Media](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Module 5

### Email 13

**Subject line:** Drive Efficiency with Focused View and Daily Digest

{{ recipient.f\_name }},

Are you tired of trying to figure out how to focus your time and resources? Good news! Total Expert has tools that can help you do that and more! In module five, you will learn how you can leverage the automation of Focused View and best utilize the Daily Digest to get the most out of your day!

To prepare for this week's module, complete this quick training course below on Focused View.





## [Training course](#)

### Email 14

**Subject line:** Don't Miss the Daily Digest

{{ recipient.f\_name }},

What if it was possible to have all of your tasks and priorities delivered straight to your inbox every morning? It is! The Daily Digest is an email delivered every morning that summarizes your daily activities. It highlights upcoming tasks, new and engaged contacts, Focused View appointments, birthdays and loan anniversaries, and more!

In Module 1, you should have already turned on the Daily Digest email in your notification settings. If they are not turned on, go to the notifications tab in your account settings and turn it on.

#### Today's Activities

- Go into this morning's Daily Digest email and take two actions based on the information you see.
  - Any birthdays? Send a kind birthday message to a prospect, lead, or client.
  - See any new marketing content? Log in and view the new content available to you.
  - Notice any newly created contacts? Think about reaching out!

#### Help Resources

- [How to leverage the Daily Digest](#)

If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

### Email 15

**Subject line:** Get Focused.

{{ recipient.f\_name }},

A recent study by Total Expert found that loan officers who use the Focused View feature experienced a **10% increase in lead-to-application**. Focused View automatically surfaces leads and contacts into lists based on priority and business goals. When you log in to Total Expert, you will find pre-built Focused Views that are already pulling in contacts and data. This way you can start each day with the best money-making opportunities laid out for you in one place with a 360-degree view of your contact – all you need to do is reach out!

#### Today's Activities

- Look at the different Focused Views available and check out the leads coming into Total Expert
- Call five leads/contacts that are populating in a Focused view
- Add a note to the contact record and log an outcome

#### Help Resources

- [Video: Best Practices for using Focused View](#)
- [How to log an outcome](#)




If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Module 6

### Email 16

**Subject line:** Email Marketing in Total Expert

{{ recipient.f\_name }},

Congrats! You have made it to the final module of Bootcamp. In this last module of Bootcamp, you will learn how to send direct emails/video emails to contacts, schedule email messages, and review your email statistics. 

Research shows us that email is still the best channel to reach people on, even with the increase in popularity of social media and other messaging platforms.

After you send an email, you can always go back and check the email stats to see who is engaging with your marketing. To learn how to leverage email stats, check out this [help resource](#) or go through the simulation below!

[Email Stats Simulation](#)

### Email 17

**Subject line:** Make 1:1 Messages Personal with Video

{{ recipient.f\_name }},

Video messaging puts you at the heart of the customer experience. It allows you to add a human touch to the moments that matter most in life. According to BombBomb, a video email marketing platform, 81% of their customers generated more replies when they used video content in their emails.

Do you leverage BombBomb? If not, now is the time to start. Integrating BombBomb with your total expert account will allow you to create customized videos on the spot to send to your leads, borrowers, and past clients.

#### Today's Activities

- If you use BombBomb, send out a video email to one contact
  - Send a birthday or loan anniversary video to a past client
  - Send a welcome video to a new contact
- If you don't use BombBomb, send a regular email to a group of contacts in Total Expert
- Review the email stats

#### Help Resources

- [Set up BombBomb integration - simulation](#)
- [Sending a BombBomb video email](#)
- [How to send an email to selected recipients](#)



If you have any questions, click the blue chat bubble in the lower right corner in-platform and a live agent will be happy to help!

## Email 18

**Subject line:** You are officially an EXPERT!

{{ recipient.f\_name }},

Congrats! 🏆 You have officially made it to the end of Total Expert Bootcamp.

As you start to use Total Expert more and more each day, don't forget that the Knowledge Base is always there to assist you. This is your one-stop shop to get all your Total Expert questions answered. You can ask questions, browse articles, watch videos, and find answers - quickly and efficiently.

### ✔ Your Final Activity ✔

- Log into the Knowledge Base and look up a question
  - You can access the Knowledge Base by clicking the **blue chat widget** in the bottom right corner of the screen or by selecting the **help center** icon at the top of the screen.

Now that you're an EXPERT, take all the knowledge and new skills you learned in this Bootcamp and apply them to your day-to-day business. Great work!

## Best Practices

### Journey Structure

- You can deploy this journey as is, or we have also created the journey and emails in a way that is easy for you to adjust the copy, cadence, and order, if you wish.
- If you have edits to the email copy, be sure to edit within the email template in Total Expert.
- Consider adding promotion emails to the beginning of the bootcamp Journey

### Overall Bootcamp Strategy

- We recommend starting Bootcamp at the beginning of a week (Monday) so you can have 1 module per week. Consider a M/W/F cadence for each module (example below):
  - Monday = email 1
  - Wednesday = email 2
  - Friday = email 3
- For highest level of engagement, consider hosting weekly Bootcamp webinars at the beginning of each week to review the objectives, demo the activities in-platform, highlight top users, and answer any questions about Bootcamp.
  - Make a reminder to pull your leaderboard stats every Friday afternoon so you are ready for the call on Monday to showcase the winners for the week
- Consider adding promotional emails



# How to Deploy the Journey

Define how you'd like to get your end users on the journey – the “on ramp”

- End users will be considered “Contacts” in the Marketing Admin profile.
- Below are recommendations on how to deploy:
  - Option 1 – Upload your end users as contacts using the data importer and add them to a specific group. Use that group as an on-ramp to the Bootcamp Journey.
  - Option 2 – When end users go through your company’s new hire orientation on Total Expert, use a lead capture app connected to the marketing admin account to gather the end user’s info, saving you the time of adding them as contacts to the marketing admin account. You should have your end users automatically added to a group through the lead capture app, which you can use as an on-ramp to the Journey.
- Adding contacts as part of a new hire onboarding process is a great best practice to make sure all new hires are added to the Journey.

## Note

If you do not want to use the marketing admin account, create an additional user dedicated to deploying the Bootcamp Journey and any additional internal marketing messaging you will be leveraging within Total Expert.