



LOA Bootcamp Marketing Admin Guide

Table of Contents

- Journey Overview 2
- Journey Checklist 2
- Bootcamp Emails..... 3
 - Module 1: Account Set-Up 3
 - Email 1: Welcome to LOA Bootcamp 3
 - Email 2: Profile complete / notifications 3
 - Email 3: Integrations check 4
 - Module 2: Co-Marketing 4
 - Email 4: Overview of Co-Marketing 4
 - Email 5: Co-marketing invites 4
 - Email 6: Co-marketing new listing alerts 5
 - Module 3: CRM 6
 - Email 7: Overview of Focused View and Daily Digest 6
 - Email 8: Daily Digest + forwarding DD to yourself 6
 - Email 9: Focused View 6
 - Module 4: Social Media** 7
 - Email 10: Overview of social media 7
 - Email 11: How to schedule a social media post 8
 - Email 12: How to post a Single Property Site to social media 8
 - Module 5: Brand Exposure 9
 - Email 13: Overview of Lead Capture Apps and Print Marketing 9
 - Email 14: Lead Capture App 9
 - Email 15: Print marketing 10
 - Module 6: Emails 10
 - Email 16: Emails Overview 10
 - Email 17: BombBomb / Video Emails 10
 - Email 18: End of Bootcamp / Knowledge Base 11
- Best Practices..... 12



Journey structure.....12

Overall Bootcamp Strategy12

Promotional Email12

How to Deploy the Journey13

Journey Overview

Who is the audience? This Bootcamp is intended for admins to customize for their team, with the audience being loan officer assistants using the Total Expert platform

What is it? This Bootcamp is a pre-built journey with six modules, consisting of eighteen emails, designed to educate LOAs on the features and functionality of Total Expert and how they can best support their loan officer

When can it be deployed? The Bootcamp can be activated and deployed at any time by the organization. Contacts or groups can be added continuously to this journey.

Where is it found? The journey (LOA Bootcamp) is deployed out of the Total expert platform.

Why did you create it? The Bootcamp is designed to help admins promote adoption and usage of the platform and educate on the features and functionalities, in a fun and engaging way for LOAs. The Bootcamp can be used to teach someone Total Expert for the first time or to provide a refresher for those who are seasoned on the platform.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla.

Journey Checklist

Keep this checklist in mind as you are reviewing the LOA Bootcamp Admin Guide and use it to keep yourself on track before deploying the Bootcamp to your team. We suggest blocking an hour on your calendar to review the checklist below.

It is our best practice to use the journey as is. If you decide to customize the journey in any way – please make sure to review the steps below to ensure your Bootcamp launches correctly.

- Review the LOA Bootcamp framework within Total Expert.
- Review the email subjects and content.
- Review the email banner. Customize if you wish.
- When everything is to your liking, market the LOA Bootcamp to your team. Consider using the example email below.
- Import all Bootcamp participants to a group in Total Expert using the Data Importer.
- Deploy the LOA Bootcamp Journey.
- Consider ongoing gamification throughout the Bootcamp experience.



Bootcamp Emails

In the Total Expert Bootcamp 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 activity help resources included.
3. Lesson #2 with activity and help resources included.

Below you will find an outline of the journey including the three emails in each module.

Module 1: Account Set-Up

Email 1: Welcome to LOA Bootcamp

Subject line: Welcome to LOA Bootcamp!

Hi {{ recipient.f_name }},

Welcome to ⚡LOA Bootcamp⚡! 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: Profile complete / notifications

Hi {{ recipient.f_name }},

The first step in Bootcamp is to make sure that your loan officer's profile is complete and that their notifications are turned on.

✔ Today's Activities ✔

- Ensure that your loan officer's profile is complete and all the information is correct in Total Expert.
 - Review their account settings (profile, contact information, notification settings, etc.)
 - Talk to your loan officer about which notifications they would like turned on
 - Check their 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: Integrations check

Subject line: Make the Most of Your Integrations

Hi {{ recipient.f_name }},

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

✔ Today's Activities ✔

- Review your loan officer's integrations
- Inform your loan officer about any integrations that aren't set up yet and assist them in turning them on

📄 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: Co-Marketing

Email 4: Overview of Co-Marketing

Subject line: Power Partnerships!

Hi {{ 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 agents win, your loan officer wins, which also means that you win.

The ability to co-market is a huge benefit for your loan officer 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, loan officers can easily collaborate with their Co-Marketing Partners on Single Property Websites, Lead Capture Apps, and Print Marketing. They can also share leads and manage their 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: Co-marketing invites

Subject line: Creating Co-Marketing Partnerships



Hi {{ 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.

✔ Today's 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 an agent
 - Best practices:
 - Before you invite an agent to connect in Total Expert, send them a quick email or text message to give them a heads up
 - Fill in as much information for the agent as possible
 - Add in their headshot and logo

📄 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: Co-marketing new listing alerts

Subject line: Co-Marketing Listing Alerts

Hi {{ recipient.f_name }},

In the first week of Bootcamp, you should have turned on your loan officer's notification settings to receive co-marketed new listing alerts. This notification automatically emails your loan officer whenever one of their connected agents has a new listing. Today we will ensure that you receive these notifications as well!

✔ Today's Activities ✔

- Set up a mailbox forwarding rule to ensure that you are receiving your loan officers listing alerts

📄 Help resources 📄

- Use [this document](#) to set up the mailbox forwarding rule for yourself

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: CRM

Email 7: Overview of Focused View and Daily Digest

Subject line: Drive Efficiency with Focused View and Daily Digest

Hi {{ recipient.f_name }},

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

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 three, you will learn how you and your loan officer can leverage the automation of Focused View, and best utilize the Daily Digest.

To prepare for this week's module, complete this quick training course.

[Training Course](#)

Email 8: Daily Digest + forwarding DD to yourself

Subject line: Don't Miss the Daily Digest

Hi {{ recipient.f_name }},

What if it was possible to have all your loan officer's tasks and priorities delivered straight to their inbox every morning? It is! The Daily Digest is an email delivered every morning that summarizes your loan officer's daily activities. It highlights their 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 loan officer's notification settings. If they are not turned on, go to the notifications tab in their account settings and turn it on. We also want to make sure you are receiving it as well. Similar to how you set up the mailbox forwarding rule for Co-Marketed New Listing Alerts, you need to do the same thing here for the Daily Digest email.

Today's Activities

- Ensure that your loan officer is receiving the Daily Digest
- Set up a mailbox forwarding rule to ensure you get the Daily Digest email as well

 Help Resources 

- Use [this document](#) to set up the mailbox forwarding rule for yourself
- [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 9: Focused View

Subject line: Get Focused.



Hi {{ 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
- Take action on a contact / lead
- Add a note to the contact record and log an outcome

📄 Help resources 📄

- [Video: Best Practices for using Focused View \(24 min\)](#)
- [How to log an outcome](#)

It is important that you and your loan officer understand how to use the Focused View tool and have created a strategy for how you will collaborate. Once you feel comfortable with the feature, connect with your loan officer and discuss how you can best leverage the tool together to increase your pipeline.

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: Social Media

Email 10: Overview of social media

Subject line: Whoa, You're Halfway There!

Hi {{ recipient.f_name }},

Congrats! You have officially made it to the halfway point of Bootcamp. In module four, you will learn how to use social media in Total Expert to build your loan officer's brand presence and network.

Did you know that 82% of people have indicated that social media is the most common channel to get information about a brand and its products? That's a lot of potential customers!

How are you using social media today to support your loan officers' brand? It is important that you and your loan officer create a social media strategy - together. Here are some great questions you can ask your loan officer to get started:

- How many times a week do you want to post?
- What type of content do you want to post?
- What channels do you want to use to post? LinkedIn, Facebook, etc.

This week, I encourage you to discuss building a social media strategy with your loan officer.



Get ready to get social!

Email 11: How to schedule a social media post

Subject line: Get Social!

Hi {{ recipient.f_name }},

When was the last time you posted on Facebook for your loan officer? What about LinkedIn? Have you ever wanted to post but were unsure what to say?

With Total Expert, social media posting is made easy with the ability to post directly to Facebook, Twitter, and LinkedIn. In module 1 you should have already integrated your loan officer's social media accounts. If not, be sure to do that before this activity.

It is important to stay consistent with your social posting. As a best practice, we recommend putting a 15-minute time block on your calendar every Monday morning to schedule your social media posts for the week. If you struggle with what to post, consider highlighting upcoming holidays, events, webinars, or industry news.

☑ Today's Activities ☑

- Schedule two social media posts for your loan officer this week from Total Expert.

📄 Help resources 📄

- [Posting Content to Social Media](#)
- [Video: Best Practices for Posting 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!

Email 12: How to post a Single Property Site to social media

Subject line: Post Your Listings to Social.

Hi {{ 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 Site 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 loan officer's account and create a Single Property Site for one of their agents' listings (remember to “ADD” the agent to the contact info when creating the site)
- Post the Single Property Website that you created to all Social Media channels (tag the agent)
- Share the link with the agent

Help resources

- [Creating a Single Property Site](#)
- [Posting a Single Property Site 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: Brand Exposure

Email 13: Overview of Lead Capture Apps and Print Marketing

Subject line: Make Yourself Stand Out!

Hi {{ recipient.f_name }},

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

Before we get started, take this quick course on Lead Capture Apps.

[Course Link](#)

Email 14: Lead Capture App

Subject line: Never Miss a Lead.

Hi {{ 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 your loan officer and their agent. 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 15: Print marketing

Subject line: Make the Most of Marketing

Hi {{ recipient.f_name }},

Print marketing materials are essential to building your loan officer's brand and getting their face out there. It can help grow their business by allowing them 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 Infographic for a new listing and send the PDF to your agent

📄 Help resources 📄

- [How to create an Infographic](#)
- [Print Marketing Training Video](#)

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: Emails

Email 16: Emails Overview

Subject line: Email Marketing in Total Expert

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: BombBomb / Video Emails

Subject line: Make 1:1 Messages Personal with Video

Hi {{ 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.



Does your loan officer use BombBomb? If not, now is the time to start. If they do, ensure that their BombBomb integration is set up in Total Expert. Integrating BombBomb with their total expert account will allow your loan officer to create customized on the spot videos to send with their emails – or that you can send on their behalf!

✔ Today's Activities ✔

- If your loan officer uses BombBomb, send out a video email to one contact on their behalf
 - Send a birthday or loan anniversary video to a past client
 - Send a welcome video to a new contact
- If your loan officer does not use BombBomb, send a regular email to a group of contacts in Total Expert or talk to them about the benefits of BombBomb
- 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: End of Bootcamp / Knowledge Base

Subject line: You are officially an EXPERT!

Hi {{recipient.f_name}}!

Congrats! 🎓 You have officially made it to the end of 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 **grey 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 LOA 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

Promotional Email

Hi [LOA's],

We are super excited to share that we are launching Total Expert Bootcamp for all Loan Officer Assistants! Whether you are brand new to the system or seasoned on the platform, we have created an interactive experience that will turn you into a Total Expert EXPERT in no time!

Here is what you need to know:

- LOA Bootcamp starts on [insert date here]
- Bootcamp consists of six modules, with three emails in each module
- Each email has an activity for you to complete, which is meant to teach you the key features and functionality of Total Expert in a fun and engaging way

Once Bootcamp launches on [bootcamp start date], you'll be sent your first activity and be on your way!

If you have any questions, please reach out to [insert contact info here].

[signature]



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.