



Marketing Admin Guide: Gamification Email Templates

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How to Deploy the Gamification Email Templates

These email templates are meant to help your organization drive engagement and adoption by promoting Total Expert through a gamified monthly email. Below is a step-by-step guide on how to prepare, create and deploy the monthly newsletter. Please reach out to your Customer Success Manager if you have any questions.

Step 1: Review the Email Templates

We have created two different gamification email templates. Please review both templates below, along with the unique sections in each email.

Template 1

- [Preview link](#)

- Sections:

Top Total Expert Users

- This section highlights the end users with the highest usage for the month by category. We have used the following categories as an example, but you can use any categories you wish:
 - Social Expert (highest number of social media posts)
 - Sites Expert (highest amount of Single Property Websites created)
 - Print Expert (highest amount of print assets created)
 - Co-Marketing Expert (the most co-marketing partners accepted)

Loan Officer Spotlight

- This section is intended to spotlight one loan officer each month
- Consider including a best practice, a unique way they are using the platform, or any recent successes they have had



⚡ Monthly Challenge ⚡

- Create a challenge for your loan officers for the month
- The challenge can be used to promote using new content or features
- Consider adding an incentive by rewarding users who complete the challenge

Template 2

- [Preview link](#)
- Sections:

★ Total Expert Leaderboard ★

- This section is meant to add gamification by leveraging a leaderboard that highlights the top loan officers for the month for different categories including:
 - Social Expert (top three loan officers who created the most social posts)
 - Sites Expert (top three loan officers who created the most Single Property Websites)
 - Print Expert (top three loan officers who created the most print assets)
 - Co-Marketing Expert (top three loan officers who had the most co-marketing connections accepted)

★ Loan Officer Success Story ★

- Highlight a success story from one of your loan officers
- Consider including a best practice, a unique way they are using the platform, or any recent successes they have had

★ Feature Spotlight ★

- Each month highlight a new feature in the platform or new content you have released
- Discuss best practices for that feature

Step 2: Customize Your Template

Once you have decided which template you would like to use, then you can start customizing. Below you will find instructions on how to customize each template.

Template 1 Customization

- This template includes three main sections: Top Total Expert Users, Loan Officer Spotlight and Monthly Challenge.
- This template is fully customizable: change the fonts, and colors and customize the emojis next to each header to make your email on brand to you.
- We have provided example emojis unique to each category. To change them simply copy and paste your own into the template.

Email Header

Our Total Expert branded “Marketing Minute” header will show up as default. If you prefer, you can design your own header and use that instead. To change the header, double-click on the existing header and upload your customized header.



Top Total Expert Users

This section allows you to showcase your top performers each month. The template highlights the following categories:

- Social Expert (highest number of social media posts)
- Sites Expert (highest amount of Single Property Websites created)
- Print Expert (highest amount of print assets created)
- Co-Marketing Expert (the most co-marketing partners accepted)

You can keep these categories as is, or if you have other categories you would like to highlight such as Lead Capture Apps, Focused View, Emails, etc., you can add those in. If you use additional categories, you will want to ensure you have access to monthly reporting on these features (ie. standard reporting).

For the sample categories, all of the data can be found in the Marketing Overview Report in Total Expert.

Follow these steps to determine your top users:

1. Use the left navigation panel in platform to select reporting and analytics > marketing overview
2. Change your filter: first and last day of the month
3. Click on the name of the category twice until it sorts from highest to lowest
4. Pick the top user for that category for the month
5. Repeat the same for each category you are highlighting
6. Insert the name of the top user for each category into the email template

Loan Officer Spotlight

Each month, we recommend selecting a loan officer to showcase in your monthly email. This helps your loan officers feel appreciated and recognized while encouraging other loan officers to adopt their successful strategies.

1. Select the loan officer you want to highlight that month. This could be a top-performer, and loan officer with a recent success story, or someone new to the company.
2. Reach out to the loan officer and let them know they have been chosen. If they accept, follow these few steps:
 - a. Insert their headshot
 - b. Include the loan officer's full name and write a short summary.

Here are some ideas / best practices to write about:

- Highlight any unique ways loan officers are using the platform
- Showcase power users of the platform and your top producers

What to include in the summary:

- Introduction / general information
- Years with the company
- Quotes
- Recent successes
- Fun facts

Monthly Challenge

Promoting a monthly challenge is another great way to keep your loan officers engaged. Edit this section to create your own challenge each month! See below for some ideas:

- Promote new content (ie. challenge your loan officers to post your new social media graphic to their social pages).



- Encourage them to utilize features:
- Create a Lead Capture App
- Create a Single Property Website
- Create a custom Focused View
- Send a bulk email
- Activate a Journey
- Challenge users to create and send out a certain number of BombBomb videos throughout the month

Prizes

If you want to add an incentive to the monthly challenge, you can reward the winner with swag or other promotional items. Be sure to call this out in the email to encourage participation.

Video

You will notice that we included a short BombBomb video showing the loan officers how to complete the monthly challenge. We find that it is important to do a brief demonstration in platform so that loan officers are seeing the platform and are reminded to log in.

Our template utilizes a BombBomb video to provide a tutorial for the challenge. If you do not use BombBomb, feel free to use whatever other video recording tool you use. Record your own video or insert any additional images/text to create your own customized challenge!

Template 2 Customization

- This template includes three main sections: Total Expert Leaderboard, Loan Officer Success Story and Feature Spotlight.
- This template is fully customizable: change the fonts, and colors and customize the emojis next to each header to make your email on brand to you.
- The template uses a star emoji as an example. To change it simply copy and paste your own emoji into the template.

Email Header

Our Total Expert branded “Marketing Minute” header will show up as default. If you prefer, you can design your own header and use that instead. To change the header, double-click on the existing header and upload your customized header.

Total Expert Leaderboard

This section allows you to showcase your top performers for the month in a leaderboard format. The template highlights the following categories:

- Social Expert (highest number of social media posts)
- Sites Expert (highest amount of Single Property Websites created)
- Print Expert (highest amount of print assets created)
- Co-Marketing Expert (the most co-marketing partners accepted)

You can keep these categories as is, or if you have other categories you would like to highlight such as Lead Capture Apps, Focused View, Emails, etc., you can add those in. If you use additional categories, you will want to ensure you have access to reporting on these features (ie. standard reporting). For the sample categories, all of data can be found in the Marketing Overview Report in Total Expert. Follow these steps to determine your top users:



- Use the left navigation panel in platform to select reporting and analytics > marketing overview
- Change your filter: first and last day of the month
- Click on the name of the category twice until it sorts from highest to lowest
- Pick the top three users for that category for the month
- Repeat the same for each category on your leaderboard

Once you have selected your top three users for each category, you will need to customize your leaderboard. To edit and customize your leaderboard, follow these steps:

1. Download the [leadboard template](#) from the Knowledge Base
2. In the left corner select file > save as > download a copy to your computer
3. Save this file to your desktop
4. Edit the leaderboard to include the list of top users you found in Total Expert
5. Click save

To insert your leaderboard into the email:

1. Export the PowerPoint as a JPG by selecting file > save as > download as JPG
2. Save this file to your desktop
3. In Total Expert, double click on our example image
4. You can now drag and drop your new customized leaderboard into Total Expert

Loan Office Success Story

Each month, we recommend sharing a success story from one of your loan officers. This helps your loan officers feel appreciated and recognized while encouraging other loan officers to adopt their successful strategies.

1. Select the loan officer you want to highlight that month.
2. Reach out to the loan officer and let them know they have been chosen. If they accept, follow these few steps:
 - a. Insert their headshot
 - b. Include the loan officer's full name and write a short summary of their recent success.

Here are some ideas / best practices to write about:

- Highlight any unique ways loan officers are using the platform
- Showcase power users of the platform and top producers

What to include in the summary:

- Introduction / general information
- Years with the company
- Quotes
- Recent successes
- Fun facts

Feature Spotlight

In this section, we recommended that you select one Total Expert feature to highlight for the month. Write a brief summary of the feature and explain the value behind it.

We recommend including additional help resources including videos, articles, training courses or any other helpful information about the highlighted feature. Consider using materials from the Knowledge Base to help you get started!



Video: You will notice that we included a short BombBomb video showing the loan officers how to create a Lead Capture App. We find that it is important to do a brief demonstration of the feature in platform for the loan officer so that they are seeing the platform and are reminded of how to use the feature. Our template utilizes a BombBomb video to provide a tutorial for the challenge. If you do not use BombBomb, feel free to use whatever other video recording tool you use. Record your own video or insert any additional images/text to create your own customized challenge!

Step 3: Deploy the Email

Once you have customized your template and added in your copy, you are now ready to deploy the email. To begin, you will need to make sure you have created an internal employee group so that you can send the email internally to your team.

Instructions

Step 1: Create an internal group in Total Expert

- On the left-hand navigation find leads & contacts > groups > +create
- Create a name and description of the group (ie. employees, loan officers, all staff, internal)
- Click submit

Step 2: Import your loan officers as contacts into Total Expert into the internal group

- If you do not know how to use the data importer, please review this [step by step guide.](#)

Step 3: Test the email

- Navigate to email marketing > emails
- Locate the email > actions > send
- Click on recipients > find the contact you would like to send the test email to
- Click send email

Step 4: Deploy the email

- Navigate to email marketing > emails
- Locate the email > actions > send
- Click on recipients > find the blue filter button in the right-hand corner
- Add your internal group name to the included groups filter (this should automatically filter the list for you)
- Press the **X** at the top right
- Click send email