

Self-Serve Engagement Kits

Overview & Best Practices

Overview:

The Self-Serve Engagement Kits ensure that you will have all the necessary resources to continually drive momentum and adoption of specific features within the Total Expert platform. There are currently 14 kits available, each with two components:

1. Presentation
2. Presentation Guide

The pre-built presentations are ready-to-use, saving you time and effort by providing a beautifully branded deck that includes the proper content and information you need to make it an informative and engaging experience. We have also created a guide that compliments each presentation, providing an easy and intuitive, step-by-step script to guide you through each slide. These also contain best practices for customizing and personalizing your sessions.

If you have white labeled the platform or want to use your own branding, these pre-built presentations will still be helpful in laying out a framework for your session, saving you valuable time and resources.

Self-Serve Engagement Kits:

- Integrations
- Daily Digest
- Contacts and Groups
- Workflow Management
- Focused View
- Co-Marketing:
 - Connecting with a Co-Marketing Partner
 - Co-Marketing Partner Accounts
 - Handling Objections from Co-Marketing Partners
- Infographics
- EDDM (Every Door Direct Mail)
- Emails and Campaigns
- Lead Capture Apps
- Single Property Sites
- Social Media

Best Practices:

1. Start utilizing these kits once you go live on the platform.
2. Host a Total Expert workshop on a regular cadence with your Loan Officers and use the self-serve engagement decks to cover a certain topic each time. This promotes continued education and engagement with your Loan Officers and Total Expert.
 - Example: Host a monthly, 30-minute marketing workshop where you cover a particular topic in Total Expert.
3. To stay on brand with your organization, personalize the engagement decks with logos and screenshots that are personal to your organization.
 - Example: Add a screenshot of one of your organization's social media posts to the social media engagement deck so that the presentation feels personal to your Loan Officers.
4. If you are leading a 1 on 1 session or a small group training, use the kits to guide the conversation on a given topic.
5. Pre-record yourself going through each presentation and then make recordings available to your team so they can reference back when needed.
6. Offer a weekly Total Expert training course for new Loan Officers and use the training guides to streamline your onboarding process.
7. Use the engagement kits in tandem with the LO onboarding and engagement journey in Total Expert.
8. Incorporate success stories and usage stats as they are applicable to each kit.
 - Example: Leverage data in the Marketing Overview Report.