

MLO Playbook: Co-Marketing Presentation

Step 1: Pick your webinar / meeting date and time

- For in-person events make sure to include date, time, time zone, and location
- For virtual events, create a webinar meeting on whatever software your organization uses (Zoom, Teams, etc.)

Step 2: Create Lead Capture App for the event

- Log in to Total Expert and click Lead Capture App in the left sidebar menu
- Follow-on screen instructions to complete Event Registration Form

Step 3: Customize your invitation

- Use [this example email](#) invitation to get started
 - Make sure to select either virtual or in-person copy
- Input your meeting information from step 2
- Add the landing page link as your registration link

Step 4: Define your target agents

- Invite agents you frequently do business with (do not mass email agents)
- Invite agents by phone or in-person first, letting them know you will email them the information to join

Step 5: Invite agents

- Send email in Total Expert to list or group of agents in Total Expert
- Send invite at least two weeks prior to event date
- Send follow up email to agents who have not registered 1 week out

Step 6: Customize the Co-Marketing presentation and script

- Download the “Total Expert Co-Marketing Presentation” from Total Expert
 - Add your headshot, name, and contact information
- Swap out any images you wish (maybe you want to include examples that have your image)
- As you customize or change around the presentation, make sure to update the script accordingly

Step 7: Practice presentation

- Use this [presentation guide](#) to help you with your talking points for each slide

Step 8: Send Co-Marketing Invitations immediately after presentation

- Send Co-Marketing invitation to interested agents
 - Consider following up with them 1:1 after they express interest to get them signed up for Total Expert