



Presentation Guide: Integrations

In this session, marketing administrators will train their end users on how to connect and integrate external accounts to centralize their marketing efforts.

POWERPOINT

Agenda

- About integrations
- How this helps you win
- In-platform training
- Best practices
- Your next steps!

About Integrations

- Foundation for sales and marketing tech stack.
- Integrates across multiple systems.
- Brings together marketing, content, and data.

Integrations

- *Dependent on your organization setup and integration offerings, highlight the following types of integrations:*
 - Loan Origination System (LOS)
 - Point of Sale (POS)
 - Pricing Engine
 - Content Provider
 - Lead Sources

In-App Integrations

- *Dependent on your organization's integration offerings, review the integrations most relevant to your audience:*
 - Office 365
 - Zillow
 - Twilio
 - BombBomb
 - Social Media
 - Facebook
 - Twitter
 - LinkedIn



How This Helps You Win

- Brings functionality together: consolidate your technologies into one platform.
- One place to “do your day”: leverage Total Expert as your centralized marketing tool by connecting all your external accounts.
- Collect and nurture all leads.

In-Platform Training

Before you begin - assist and guide users with the login process based off your organization’s login method

How to Integrate External Accounts

- Within the navigation menu, click on your name at the top right (account menu), then select Integration Settings.
- Review the following Integrations that are applicable to your organization and users:
Do not actually click Connect on any of these, verbally explain the integration process as outlined here
 - Office 365:
 - Allows you to sync tasks and appointments created within Total Expert to Office 365. Email history between contacts will be tracked within Total Expert as well.
 - To connect, click Connect and it will redirect users to type in their Office 365 credentials.
 - Twilio
 - Enables users to send SMS messages directly to contacts from Total Expert.
 - A Twilio account is needed to enable this functionality.
 - Twilio account costs \$1 per month, per phone number.
 - Some users will purchase multiple phone numbers with different area codes.
 - The first 200 sent and received text messages per month are complimentary via Total Expert.
 - After a user has surpassed 200 text messages in a month, the cost is \$.01 per text sent and \$.01 per text received.
 - To connect, click Connect and tell users to follow the prompts.
 - BombBomb
 - Enables users to embed videos into their email marketing.
 - Helps users humanize and personalize the marketing experience they deliver to their contacts.
 - A separate BombBomb account is needed.
 - Can sign up at bombbomb.com. Packages as low as \$29 a month.



- Once registered, users will need to copy their API key from their account at bombbomb.com. and paste the API key in Total Expert.
- Zillow
 - This is for any users who pay for Zillow leads.
 - Allows users to automatically bring those leads right into their Total Expert account to manage.
 - Enables users to communicate with those contacts, put them on campaigns, etc. right from the platform.
 - Click on Send Message to start the process and follow the prompts.
- Social Media: allows users to post and share content from Total Expert directly to Social Media
 - Facebook
 - Connect personal page first, then add a business page after.
 - Content can only be shared on business pages, not personal pages.
 - Click Connect, it will redirect to Facebook's login page. Type in username/password and complete process.
 - Twitter
 - Click Connect, it will redirect users to Twitter's login page. Type in username/password and complete process.
 - Both Facebook and Twitter integrations only need to be connected once and it is permanent.
 - LinkedIn
 - Click Connect, it will redirect users to LinkedIn's login page. Type in username/password and complete process.
 - LinkedIn requires users to reauthenticate their login credentials every 60 days. Users will be reminded as those 60 days are approaching.

Overview of Integrations In-Action

- Within the navigation menu, click on Leads and Contacts > Contacts.
 - Check off the box of any contact.
 - Click on the Actions menu at the top left and review the following actions:
 - Send BombBomb Video
 - Send SMS (Twilio)
 - Zillow: Leads purchased through Zillow will automatically generate into their Contacts list.
- Within the navigation menu, click on Web Marketing > Social Media > Create New.
 - Let users know they can share any content on this page directly to Facebook, Twitter, or LinkedIn.
 - Click Actions on the far right of any social content, then click Share.



- Quick overview of how to post to social media.

POWERPOINT

Best Practices

- Connect available integrations.
- Incorporate social media to build your personal brand and increase your reach.
- Bring all of your leads into Total Expert and nurture those leads using platform automation.
- Leverage integrations like Twilio and BombBomb for multi-channel communications.

Going Forward from Here

- For adoption and retention purposes – encourage your audience to access supporting documents, videos, and resources and demonstrate where they can access our Help Center within the platform, as well as reaching out to our Product Support team.