



Supporting Your Loan Officers’ Referral Partner Relationships

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Six Best Practices for Marketing Administrators

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Automate a ‘thank you’ email communication to the sellers’ agent after the loan funds

- Two days after the loan funds, automate a thank you email to the seller’s agent
- Consider adding the automated message to your existing In-Process Purchase Journey
- Thank them for being a great partner and ask them if they would be open to a 30 min coffee meeting to get to know each other better and learn more about their business



Example Email / SMS Communication to the Seller's Agent After the Loan Funds :

Thank You Email to Seller's Agent

Email Copy

Subject: Thank You! Open to Connect?

“Hi {{recipient.f_name}},

I wanted to reach out and say thank you for such a smooth transaction. It was a pleasure working with you.

As you may have noticed, one of the things I pride myself on is the consistency and quality of my communication throughout the loan process as well as facilitating an on-time closing. From my experience working with many other agents, life is easier when clients feel updated throughout the loan process, and it also makes you, as the agent, look great to your customers.

I would love to grab 10 minutes with you and provide a quick overview of how we could be a resource and help level up your team. If you're interested, you can reply to this email, and we can set up some time.”

Thank you,

{{sender.f_name}}

Thank You SMS to Seller's Agent

SMS Snippet Text

Snippet Name: Thank You Text to Seller's Agent

“Hi {{loan.sellers_agent.f_name}}!

I wanted to reach out and say thank you for such a smooth transaction. It was a pleasure working with you.

I would love to grab 10 minutes with you and provide a quick overview of how we could be a resource to your team. If you're interested, you can reach me at {{sender.phone_cell}}.”

Include the buyer's agent and seller's agent on status updates throughout the loan process

- Include an email notification to the buyer's agent and/or the seller's agent on loan status updates throughout your In-Process Purchase Journey
- Things to consider:
 - Do you want agents to get notifications at each status – or only certain statuses throughout the loan process?
 - Do you want to delay the notifications? Some organizations like the agents to get notified after the borrower, so they include a timer delay before the notification to the agent.



Example Buyer's / Seller's Agent Loan Milestone Email Updates

Milestone: Appraisal Ordered

Email to Buyer's/Seller's Agents

Hi {{recipient.f_name}},

I'm reaching out to let you know that the appraisal was ordered for {{loan.borrower.f_name}}
{{loan.borrower.l_name}}'s property at {{loan.address_1}}.

I will reach back out to you to confirm when we receive the appraisal.

Please let me know if you have any questions!

Best,
{{sender.f_name}}

Milestone: Appraisal Received

Email to Buyer's/Seller's Agents

Subject line: The Appraisal Has Been Received!

Hi {{recipient.f_name}},

Great news! We have received the appraisal for {{loan.borrower.f_name}} {{loan.borrower.l_name}}'s property at
{{loan.address_1}}.

I will reach back out to you to confirm when the loan is sent to underwriting.

Please let me know if you have any questions!

Best,
{{sender.f_name}}

Milestone: Sent to Underwriting

Email to Buyer's/Seller's Agents

Subject line: On It's Way to Underwriting!

Hi {{recipient.f_name}},

We have successfully sent the loan application to underwriting for {{loan.borrower.f_name}}
{{loan.borrower.l_name}}'s property at {{loan.address_1}}.

Please let me know if you have any questions!

Best,
{{sender.f_name}}



Milestone: Conditionally Approved

Email to Buyer's/Seller's Agents

Subject line: One Step Closer!

Hi {{recipient.f_name}},

The loan application for {{loan.borrower.f_name}} {{loan.borrower.l_name}}'s property at {{loan.address_1}} has been conditionally approved.

Please let me know if you have any questions!

Best,

{{sender.f_name}}

Note:

Every organization's data configuration is set up differently. Please review the suggested email copy carefully and make sure it matches up to your organization's loan milestone updates before implementing. If you are unsure, reach out to your Customer Success Manager.

Automate a weekly marketing/industry update to the loan officer's referral partner network

- Leverage our weekly Expert Content real estate agent newsletter, *Expert Update*, which provides referral partners with relevant and useful mortgage and real estate industry news.
- Best practice is to use campaign builder to deploy these campaigns
- If the weekly cadence is too frequent for your organization, you can review all the weekly *Expert Update* emails and use your favorite content to build your own newsletter and send on a different cadence

Create and load a 'real estate agent partnership proposal' presentation into the Total Expert platform

- Create a real estate agent pitch deck that highlights why an agent would want to work with a loan officer at your company
- Include information about your products, services, and value proposition
- To help you get started, check out our LO to Realtor Co-Marketing Presentation
- Upload the PowerPoint into Total Expert for easy access via [static media uploader](#)

Creating a Real Estate Agent Partnership Proposal Presentation

What is it?

A real estate agent partnership proposal presentation is a presentation that loan officers can leverage to promote the organizations products, services, and value proposition to real estate agents to drive referral partner business.

Why is it important?

A real estate partnership proposal presentation is a great way for loan officers to solidify their company story and personal story about how they are going to drive value back to their real estate agent partners.



What type of content should be included?

- Start by sharing about your company (1-2 slides)
 - Mission / values
 - Key statistics
 - Quotes
 - What makes your company stand out?
- Originator specific slides (1-2 slides)
 - Leave a few slides with instructions for your originator to promote their personal brand
 - Ideas:
 - Describe your team members: branch, LOA's processors, underwriters, etc.
 - Recent reviews
 - Testimonials
 - Showcase personal statistics
 - How many purchase transactions have you done
 - What did that equate to in real estate agent commissions
 - Why else would an agent want to work with you?
- Highlight the suite of products and services that makes your company different? (2-3 slides)
 - Key loan product differentiators (products, pricing, etc.)
 - The borrower experience
 - Highlight the customer experience and mutual benefit to agents
 - Marketing / Co-branding differentiators (2-3 slides)
 - Create a few slides that originators can customize to showcase their co-marketing strategy
 - Ideas:
 - Lead generation
 - Events
 - Continuing education
 - Marketing campaigns
 - Long term nurturing
 - In-process transparency and collaboration tools
 - Customer for life (post-close, survey tools)
 - Data intelligence you are using to surface the next opportunity for agents
- Closing slide: what would it take to earn your business? (1 slide)

Where should this live?

Upload your real estate agent pitch deck PowerPoint into your Total Expert print library using the [static media uploader](#).

Tip:

Make sure the presentation is customizable to all of your originators. This should be a template that all of your originators feel comfortable using to present to new or existing agents.



Consistently create and promote social media content that is evergreen and timely

- You should be creating new and fresh content that helps highlight the key differentiators between your company and others
- Make sure to tell your loan officers when this content is uploaded to Total Expert and encourage them to post

Social Media Tips for Marketing Admins

General Social Media Tips:

- Keep it consistent
- Be where your audience is
- Post a variety of content: evergreen and timely
 - Educational
 - Testimonials
 - Market updates
 - Video
- Quality over quantity; be authentic

Best Practices for Marketing Admins

- Create or evaluate your organizations social media strategy
- Create 1-2 NEW pieces of social media content per week
 - Communicate new assets available and how to share
- Focus on content that feeds both consumers and referral partners
 - Market update
 - Industry updates
 - Mortgage readiness and educational content
 - Loan products / services
- Post content that is evergreen and timely
- Leverage video in your social media content
- Less is more; clean up your social media library quarterly
- Review social media stats monthly to see which content is being leveraged the most and having the best engagement; emulate that content

Assist your loan officers in hosting a webinar or in-person lunch ‘n’ learn event (i.e., first-time homebuyer, VA seminar, agent event, etc.)

- Assist loan officers in helping market their lunch n learn or virtual webinar with marketing resources including:
 - Presentation
 - Presentation Guide
 - Playbook
 - Email Invite



- Example: LO to Agent Sales Kit (See LO to Agent Sales Kit resources in the engagement section of the Knowledge Base)

Webinar Recordings:

- [Best Practice #1 Recording](#)
- [Best Practice #2 Recording](#)
- [Best Practice #3 Recording](#)
- [Best Practice #4 Recording](#)
- [Best Practice #5 Recording](#)
- [Best Practice #6 Recording](#)