Total Expert End User Engagement Journey

End user engagement journeys within Total Expert are important to continue your company's adoption effort as it ensures the benefits and best practices of Total Expert are consistently reinforced with your end users. As a marketer, deploying the End User Engagement Journeys through Total Expert also allows you to track effectiveness of your internal marketing efforts via the email statistics that are captured in Total Expert.

Available Journey options:

- End User Engagement | Loan Officer – Video
- End User Engagement | Loan Officer – No Video

How do you get the End User Engagement Journey ready?

- **Determine the cadence for messaging to end users**
  - The current Expert Content Journey is configured with a 7 day time delay in between emails. You can determine the sending cadence within the Journey by updating the Timer Delay component between emails.
- **Review email content to ensure the emails you send out are in alignment with the Total Expert features your organization is leveraging**
  - The end user engagement content includes content on all features within the system.
  - If you have white labeled Total Expert, consider replacing references to the Total Expert system with your white-labeled system name.
- **Define how you'd like to get your end users on the journey – the "on ramp"**
  - End users will be considered "Contacts" in the Marketing Admin profile. Note, if you do not want to use the marketing admin account, create an additional user dedicated to deploying the end user journey and any additional internal marketing messaging you will be leveraging within Total Expert. Below are recommendations on how to deploy:
    - *Option 1* – Upload your end users as contacts using the data importer on a certain cadence to add them to a specific group. Use that group as an on-ramp to the End User Engagement Journey.
    - *Option 2* – When end users go through your company's new hire orientation on the Total Expert Marketing Operating System, use a lead capture app connected to the marketing admin account to gather the end user's info, saving you the time of adding them as contacts to the marketing admin account. You should have your end users automatically added to a group through the lead capture app, which you can use as an on-ramp to the end user Journey.
  - Adding contacts as part of a new hire onboarding process is a great best practice to make sure all new hires are added to the engagement journey.

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