Total Expert Onboarding Deep Dive Journey Guide

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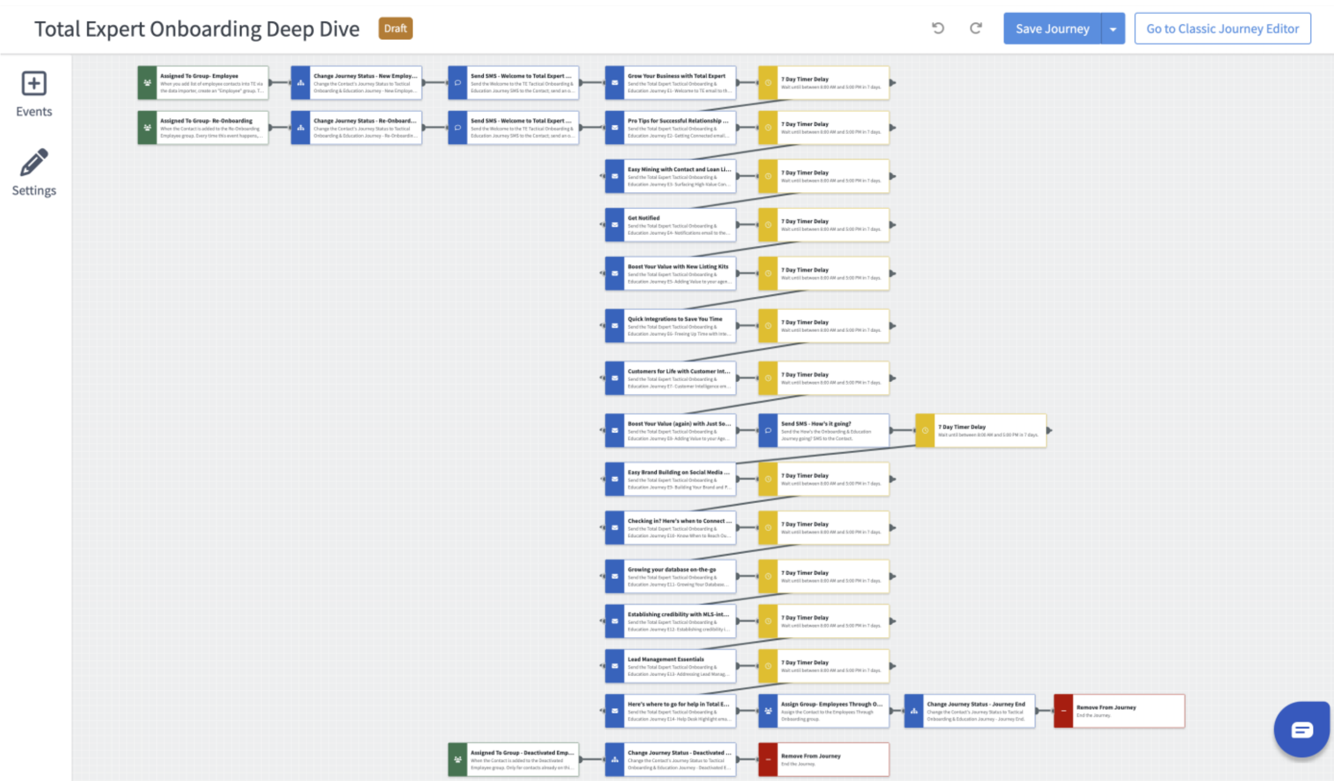
Journey Overview

This Journey is similar to the Total Expert Onboarding Journey, in that it is intended to help onboard new loan officers to Total Expert over a period of time, but it provides additional best practices and tactical step-by-step instructions on how to use different features in the system. The Total Expert Onboarding Journey introduces the features at a higher level with videos and help resources, while the Total Expert Onboarding Deep Dive Journey provides best practices for leveraging the tool, as well as tactical guidance and instruction.

You can choose which version of the Onboarding Journey you think will resonate the most with your loan officers, or you can choose to use both, at different points in time. The Journey has two different use cases: initial onboarding or re-engagement, depending on how you wish to use the Journey.

Journey Framework



- **<u>Onramp:</u>** Determine if you are going to use this Journey for initial employee onboarding or re-engagement. Remove the additional pathway (assign to group, change Journey status, Send SMS, first email, and timer delay).
- **<u>SMS:</u>** SMS texting is included in this Journey. You can remove SMS if you wish.
- **<u>Emails:</u>** There are 14 emails in this Journey. Email 1 is optional based on how you are intending to use this Journey.

- **Timer Delays:** There are 7-day timer delays between each email. You can edit these timer delays to your specified cadence.
- **Offramp:** Contacts will be moved to a group to indicate they have completed onboarding and then removed from Journey.

Journey Content

SMS

New Employee SMS Name: Welcome to Total Expert Onboarding Deep Dive

"Welcome to the Total Expert Onboarding Deep Dive Journey! Starting now, you'll get regular emails detailing how to use TE to grow your business!"

Re-Onboarding SMS Name: Welcome to Total Expert Onboarding Deep Dive

"Welcome to the Total Expert Onboarding Deep Dive Journey! Starting now, you'll get regular emails detailing how to use TE to grow your business!"

Emails 1-8

(Optional Email) Email 1 Name: Total Expert Onboarding Deep Dive Journey E1- Welcome to TE

Subject Line: Grow Your Business with Total Expert!

Hi {{recipient.f_name}}!

Welcome to {{sender.company}}! One of the tools that we use to help nurture your contact and loan database is called Total Expert.

What is Total Expert?

If you're not already familiar with TE, it is a customer engagement platform that is built to help you surface contacts when they're ready to be communicated with, whether you reach out directly or the system handles it automatically.

Along with the automation, we have an extensive library of emails, print content, and social media content that will add value to both your borrowers and co-marketing partners that you will discover when you log in for the first time.

How do I get started?

1. Work with your marketing team to get your historical data uploaded into the platform.
2. Get logged in! You will see the link in the button below to log in with your work email address and password. If you do not have a password, click the "Forgot Password" button to create one.

Log In Now! Button link: http://www.totalexpert.net

Reach out to {{sender.email}} with any questions you have. We're excited to have you at {{sender.company}}! .

Email 2 Name: Total Expert Onboarding Deep Dive Journey E2- Getting Connected

Subject Line: Pro Tips for Successful Relationship Building

Hi {{recipient.f_name}}!

Referrals and relationships make the mortgage world go around, and we want to make it as easy as possible for you to add value to your business partners within Total Expert.

What are some benefits of connecting to your Co-Marketing Partners in TE?

- TE allows you and your agents to build your brands with curated marketing materials that highlight products and listings to inform your mutual clients. This includes Lead Capture Apps and MLS integrated Single Property Sites!
- You have the ability to share basic contact data from your account to your partner's account, giving you an easy opportunity to pass referrals back and forth.
- The agent will have their own version of Total Expert separately from yours, meaning that they get a marketing operating system for free just for connecting with you!

What steps should you take?

- Identify the business partners that you'd like to have as connections in Total Expert, and set up your normal business check-in with them. We recommend in-person, if possible.
- Use that in-person meeting to talk business and walk them through the co-marketing partner registration process and highlight the marketing materials you can create on their behalf as a way to add value to their listings.
- To walk through the invitation process, here is a step by step guide. Add yourself as a Co-Marketing Partner first with your personal email address to see how it works!
    - *Co-Marketing Partner Invitation Guide*

Start the Co-Marketing Partner Process by clicking the button below!

Connect to a Co-Marketing Partner Here! Button link: https://totalexpert.net/connection/list

Email 3 Name: Total Expert Onboarding Deep Dive Journey E3- Surfacing High-Value Contacts with Contact Lists/Easy

Subject Line: Easy Mining with Contact and Loan Lists

Hi {{recipient.f_name}}!

Let's find your highest value contacts in your database within Total Expert! We will give you a quick walkthrough of how to surface those individuals in a couple buttons below:

Create a contact list button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000279124-contact-list-feature-overview

Create a loan list button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000281635-how-to-save-a-new-loan-list

To start, here are some ideas for Contact and Loan Lists for within TE that can surface individuals to reach out to!

Contact Lists:

- **Changing Rate Environment List** – Surface your potential rate refinance opportunities as the rates move down.
    - Include – Insights: Insight Types – Customer Intelligence: Rate Alert (If you have Customer Intelligence), If not, utilize the Interest Rate field and select your rate to filter on.
    - Exclude – Silenced Communication: Yes, Outcome Selected: Select any negative outcomes such as "Do Not Contact" or "Not Interested"

Loan Lists:

- **Referral Partner Effectiveness** – Keep track of how many deals are coming from specific agents and utilize these numbers to analyze the relationship and add value where necessary.
    - Click the Filter Icon in the upper right corner and highlight the individual buyer's or seller's agent name that you want to focus on in the selection. When done, save your list!
- **Pipeline View** – effectively manage your pipeline within Total Expert with an easy to view dashboard in TE.
    - Click the Filter Icon in the upper right corner and find the "Loan Status" field. Click it and then select the Loan Statuses that are within the confines of your Loan Pipeline from Full Application to Funding.

Start setting up your lists today and let us know if you have any questions on any other lists you're looking to create!

Email 4 Name: Total Expert Onboarding Deep Dive Journey E4- Notifications

Subject line: Get Notified

Hi {{recipient.f_name}},

Do you know what's going on in your account? There could be valuable things happening and there's one way to find out – Notification Settings.

Some of the key settings to consider turning on are:

Receive Text Message Lead Notifications: Receive a text message when you get a new lead in your database.

Receive Daily Email Digest: Receive a daily email from Total Expert that outlines new contacts, open tasks, loan anniversaries, birthdays, and other reminders.

Receive Co-Marketed New and Pending Listing Alerts: Receive an email when a co-marketing partner has a new listing or a listing that moves into a pending status.

Receive Email New Task Notifications: Receive an email when a new task is assigned to you or when a task assigned to you has been edited.

These notifications, and others, will keep you informed of things happening in the system that require your attention or will help you reach out to referral partners to support their listings!

Check Your Notification Settings button link: https://totalexpert.net/settings/account

Email 5 Name: Total Expert Onboarding Deep Dive Journey E5- Adding Value to your agent Relationships with Listing Kits

Subject line: Boost Your Value with New Listing Kits

Hi {{recipient.f_name}}!

Want to add some quick value for your agent partners? Listing Kits in Total Expert are for you! These kits include 3 resources. Here's how to build them:

- You know your agent listed a property – Let's create a co-branded Single Property Website to get the word out to as many people as possible.
    - How to create a Single Property Site (5 minutes)
- Next, create an MLS-integrated Infographic to share with the agent or potential buyers at an Open House!
    - Here's how to create an Infographic (5 minutes)
- Lastly, let's create an Open House Lead Capture App. Leads entered in the app will flow into your account and are automatically shared to the agent's TE account.
    - How to create the Open House Lead Capture App (5 minutes)

These three resources can be shared with your agent, posted to social media, and sent to potential buyers. For just a small amount of your time in Total Expert, you can get the word out for their listing and provide value.

Happy building!

Email 6 Name: Total Expert Onboarding Deep Dive Journey E6- Freeing Up Time with Integrations

Subject Line: Quick Integrations to Save You Time

Hi {{recipient.f_name}}!
Let's make life easier in Total Expert by setting up some available integrations! Here are a few that are quick to set up:

Office 365 Integration – This integration syncs tasks and appointments from Total Expert to your Outlook Calendar. It also brings into TE the most recent 200 emails between you and any contact from Outlook.

Office 365 button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000251362-how-to-integrate-with-office-365

Social Media Integrations – Total Expert integrates with Facebook, Instagram, X, and LinkedIn. These integrations will allow you to create and schedule posts from TE to your social media accounts.
Click the buttons to learn how to integrate with each platform:

Facebook button: https://totalexpert.freshdesk.com/support/solutions/articles/22000251272-how-to-integrate-with-facebook-meta-
Instagram button: https://totalexpert.freshdesk.com/support/solutions/articles/22000280657-how-to-integrate-with-instagram-meta-

Twitter/X button: https://totalexpert.freshdesk.com/support/solutions/articles/22000251318-how-to-integrate-with-twitter
LinkedIn button: https://totalexpert.freshdesk.com/support/solutions/articles/22000251308-how-to-integrate-with-linkedin

With social posts, we recommend scheduling all of them for the month at once, so you have them all completed with peace of mind that they will go out when you intend!

Email 7 Name: Total Expert Onboarding Deep Dive Journey E7- Customer Intelligence

Subject line: Customers for Life with Customer Intelligence

Hi {{recipient.f_name}}!

Did you know that Total Expert has automated ways to enrich your data? TE uses a tool, Customer Intelligence, to surface targeted, high-quality insights. Listing Insight, Mortgage Credit Inquiry, Equity, and Rate Alerts keep you in front of changes to your borrowers' financial needs. To see a detailed breakdown of all the insights, click the button below:

CI Alert Breakdown button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000284170-customer-intelligence-alerts-end-user

You will receive a notification when the alerts generate, which can automate communication to your clients.

Warning: Remove email if you do not leverage Customer Intelligence.

Email 8 Name: Total Expert Onboarding Deep Dive Journey E8- Adding Value to your Agent Relationships with Just Sold Kits

Subject line: Boost Your Value (again) with Just Sold Listing Kits

Hi {{recipient.f_name}}!

You already know how to help your agents when they list a property, but what about when that agent's property sells? A "congrats" is nice, but how can you turn it into a co-marketing opportunity.

When your agent's listing sells:

1. Update the property's Single Property Website with a "Just Sold" banner, along with a message that hypes you and your partner.
2. Consider sending a Just Sold co-branded Every Door Direct Mail (EDDM) postcard to the surrounding neighbors of the sold property. This will increase your and your agent's brand awareness in that area.

Create an EDDM Postcard Here button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000255926--video-how-to-create-every-door-direct-mail-eddm-

Keeping momentum with your agents is a great way to show that you're committed to developing additional business.

SMS

SMS Name: How's the Onboarding Deep Dive Journey going?

How is the onboarding and education campaign going? We hope the tactical nature of the emails have helped you to boost your use of Total Expert!

Emails 9-14

Email 9 Name: Total Expert Onboarding Deep Dive Journey E9- Building Your Brand and Pipeline with Social Media

Subject line: Easy Brand Building on Social Media with Total Expert

Hi {{recipient.f_name}}!

You should already be connected to social media within Total Expert, so now it's time to take action with those integrations!

Sharing social media through the platform is easy. Craft your message, schedule the date and time, then let Total Expert do the rest of the work.

Posting to Social in TE button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000279736-social-media-posting

How should you plan your posts?

1. Plan your holiday posting strategy for the year.
2. Take a monthly approach for other types of posts. This will allow you to have most up-to-date, market-relevant information in your posts.

When you provide valuable, quality information, you can connect with your followers, build credibility, and give them them confidence in the mortgage process.

If you have any questions or marketing recommendations, reach out to {{sender.email}}!

Email 10 Name: Total Expert Onboarding Deep Dive Journey E10- Know When to Reach Out to Your Referral Partners

Subject line: Checking In? Here's When to Connect with Your Partners

Hi {{recipient.f_name}}!

How are you currently monitoring the effectiveness of your partnership with real estate professionals? Are there agents you aren't working with that are commonly on your loan files?

In Total Expert, there are ways to filter your loan database for those trends. Here's how to do it:

First, let's create a Loan List to prioritize specific agents.

Create Your Agent Loan List button link:
https://totalexpert.freshdesk.com/support/solutions/articles/22000281635-how-to-save-a-new-loan-list

What should you do with this information?

1. Once you create a list for the agents that you'd like to monitor, you will be able to see all their related loan details, such as amounts, rates, and statuses.
2. You can easily see how many contacts they have referred that have made it to the loan process.
3. Seeing this info aggregated will allow you to determine next steps to take with your co-marketing partners.
    a. When relationships are successful, give them your time and effort by creating supportive marketing materials.
    b. For relationships that need extra attention, meet with them to talk through creative ways to help grow your referral business.
    c. For new agents who are bringing you deals, connect with them in TE!

With loan lists, TE makes it easy to monitor your network and nurture important referral partnerships.

Email 11 Name: Total Expert Onboarding Deep Dive Journey E11- Growing Your Database On-the-Go

Subject line: Growing your database on-the-go

Hi {{recipient.f_name}}!

In today's world, you never know how you'll meet a prospective lead, so it's always good to be prepared. With Total Expert's Lead Capture Apps (LCA), you can set yourself up for fast, easy, flexible lead generation. Whether it's supporting your agent at an open house, gathering leads on social media for a home loan, or capturing leads on-the-go, these apps are made for your busy lifestyle.

Set Yourself for Quick Lead Generation On-the-Go

1. Navigate to Lead Capture Apps from the left-hand navigation menu and click the blue +Create button.
2. Select the Event Registration layout and give your app:
    - A Page Name like "My Daily Lead Capture App". This name does not display to customers.
    - A Page Title like "Looking Forward to Working Together"! This title displays to customers.
    - A Page Subtitle like "Tell me about yourself". This subtitle displays to customers.
3. Make sure to choose Yes to Show Profile and update the Background Image to something more personal, if you'd like. Click Save.
4. Select View Page on the Lead Capture Apps menu to launch the active app site. Save this tool to your phone desktop for easy access!

Set Up Lead Capture Apps button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000251205-how-to-create-lead-capture-apps

Email 12 Name: Total Expert Onboarding Deep Dive Journey E12- Establishing credibility in your network - MLS Integrated Flyers

Subject line: Establishing credibility with MLS-integrated flyers

Hi {{recipient.f_name}},

The details matter – especially when your face, name, and brand show up on a co-branded listing, rate, infographic flyer or post card. Lucky for you, Total Expert notices those details, too. That's why we're integrated with almost every MLS across the country, and we bring that integration directly into the print marketing creation process in our platform.

Check out these 4 types of MLS-integrated flyers:

Listing Flyers	Listing flyers are integrated with MLS to dynamically pull details and photos unique to a specific property.
Rate Flyers	Rate flyers combine MLS data with rate and pricing information. These can be completely editable or integrated with a pricing engine.
Infographics	Infographic flyers combine MLS data with community data, such as local points of interest, schools, restaurants, and more.
EDDM Postcards	MLS-integrated *Every Door Direct Mail* (EDDM) postcards combine specific listing details that can target mailings by geographic area.

Find the print flyer you want to create, then with just a few clicks, you'll be able to select from all your agent partners' listings with the associated images and details in your preferred template. Then, you'll make any final touches, publish, print, and share your flyer.

Create MLS Flyers button link: https://totalexpert.net/media/select

Email 13 Name: Total Expert Onboarding Deep Dive Journey E13- Addressing Lead Management

Subject line: Lead Management Essentials

Hi {{recipient.f_name}},

Having the opportunity to interact quickly and effectively with new leads is crucial – and having the right tools can make or break your success. Although knowing each lead's communication preference isn't always a science, Total Expert makes it easy to identify and surface your leads, then gives you the tools to communicate in whichever way makes sense for you and your relationships.

Call Queue	"Speed to Lead" is the name of the game and Call Queue identifies top priority leads and surfaces all pertinent information so all you have to do is pick up the phone and dial.
2-Way SMS	Send text messages back and forth to leads via the lead record and track communication history.
Journeys & Emails	Emails can be sent via intelligent journey automation, which sends the right message to the right person at the right time. You can also send one-off emails to individual leads.

When you communicate effectively with your leads, you build strong foundations to your relationships.

Find Out More button link: https://totalexpert.freshdesk.com/support/solutions/articles/22000279318-lead-management-feature-overview-simulation

Warning: Remove email if you do not leverage Lead Management tools.

Email 14 Name: Total Expert Onboarding Deep Dive Journey E14- Help Desk Highlight

Subject line: Where to go for help in Total Expert

{{recipient.f_name}},

Learning new technology or trying to get the most of your existing tools can be overwhelming, but it doesn't have to be! Total Expert equips you with multiple lines of defense to support your use of the system, no matter how long you've been using it.

Here are the benefits of using the Total Expert Help Desk:

- Contains hundreds of resources for all learning styles, including articles, resources, guides, simulations, videos, and more!
- Available 24/7
- Keyword searchable
- Basic and advanced documentation
- Always contains the most updated content

Whether you're a brand-new or experienced user, you'll find what you need in the Help Desk!

Start Searching Now button link: https://totalexpert.freshdesk.com/support/home

Best Practices For Leveraging the Journey

- Review all the onboarding emails and make sure they work for your organization. Omit or replace emails that do not apply
- Change timer delays to fit your time frame / desired cadence on onboarding
- Add in additional details / resources to the emails that are peronal to your organization
- Customize content to your organization including screenshots, wording, email headers
- Add in information that is specific to your organization

How to Deploy the Journey

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.
- Upload your end users as contacts using the data importer and add them to a specific group. Use that group as an on-ramp to the Bootcamp 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 Journey.