# The Power of Partnership: Co-Marketing in Total Expert



# **Co-Marketing Portal in Total Expert**

- You have access to Total Expert at no cost
- Use powerful, easy-to-navigate sales and marketing tools
- Easily manage your relationships and track your marketing efforts
- Quickly create marketing assets with minimal effort
- Get live, local support through the chat widget available six days a week

		Create Co-Marketing Connection(s)
Co-Marketing	Partners	Contact Selection General Info MLS Info Images Invitation
Actions	Sent To	Let's invite Anna Realtor to Co-Market
Actions *	🧕 Anna Rea	Email Subject
Actions -	Reather I	(( sender.f_name )) Invited You to Co-Market on Total Expert
Actions +	Robert Bu	Email Message File - Edit - View - Insert - Format - Table -
Actions -	Julie Real	아 /아 🏚 Formats - Verdana - 14px - B I 토 프 프 프 🗮 문 - i문 - 프 프
Actions +	Patrick B	
Actions +	Jenni Coo	EXPERT     TotalExpert
Actions •	Dana Win	Easy and effective co-marketing with Expert Mortgage!
		I would like to invite you to collaborate with Expert Mortgage on Total Expert's marketing platform.
		Connect with me to create single property websites and co-branded marketing materials!
		The process is easy: 1. Click the link below to connect
		2. Fill out your profile
		3. Let me know when you need co-branded marketing materials, or log in at any time to create your own!
		Cilck Here to accept the invitation.
		I look forward to continuing to work with you to build our brands and our business together!
		By clicking accept invitation, I authorize the co-marketing requester and their affiliates to physically and digitally reproduce, distribute, adapt,

# Key Features & Benefits

### **Co-Marketing Tools:**

- Print Marketing Library
- Lead Capture Apps and Open House Follow-Up
- Single Property Websites
- Social Media Content & Posting

### **Contact Management**

- Shared leads, notes, communication
- CRM / Groups
- Email Marketing and tracking

# **Co-Marketing Tools**



### **VA Loans**

### SERVING THOSE WHO HAVE SERVED

### **100% FINANCING FOR VETERANS**

#### VA Loans were designed for you.

Veteran's Administration (VA) loans are available exclusively to veterans, active duty service members and surviving spouses. These loans have flexible guidelines and other features not available with other loan programs.

- Don't have to be a first-time homebuye · Gift funds are acceptable
- · Limits to the amount of closing costs you
- can be charged - Your benefit can be used more than once

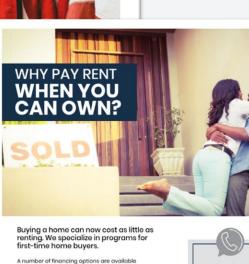
· No pre-payment penalty

Ready to turn your dreams into reality? Give us a call today!

### Jennifer Lender Loan Officer NMLS# 555555

Office: 363-123-4444 Cell: 763 123-4567 test brocker(Descample con www.mortgageexpert.com/jlondo 987 Second Avenue, Suite LS Any Texas, MN 55447





#### FHA - VA - Conventional loans Low down payment options Flexible financing terms

oan Officer | NML5#: 12345

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Call today to

learn more!

#### 1234 Lake View Ave., Suite 600 Minneapolis, MN 55432 EXPERT

# **Branded Print** Marketing Library

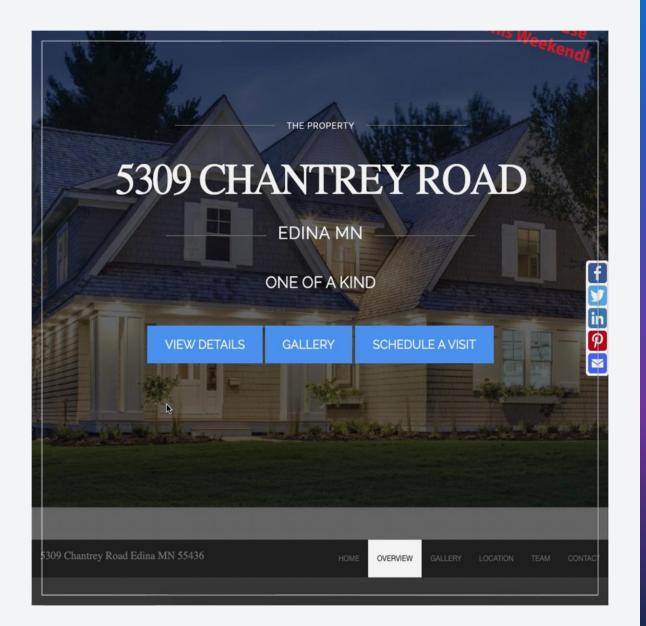
Quickly and easily deploy beautiful flyers and brochures.

- Pre-built library of content •
- Promote your listing in just a few clicks •
- Educate your clients ٠



# Lead Capture Apps & Open House Automation

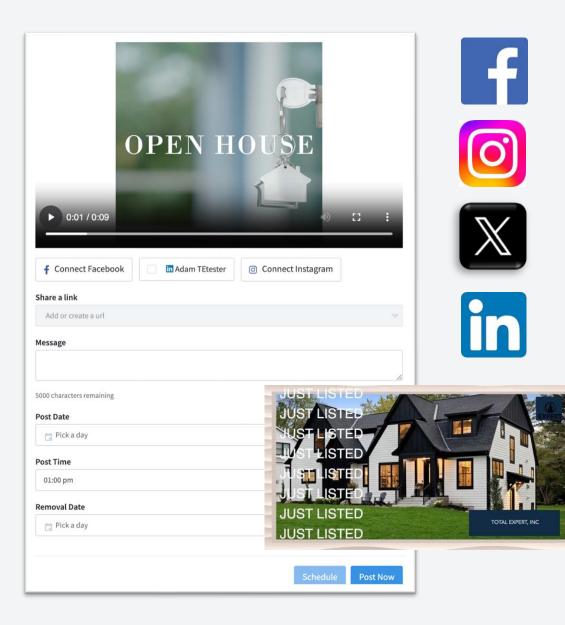
- Digital sign-in forms for your open houses
- Leads automatically funnel into Total Expert
- Automate follow-up



# Single Property Websites

Attract and engage homebuyers with beautiful landing pages for each of your listings

- Expand your reach
- Modernize your brand
- Track engagement and leads
- MLS integration
- Multi-channel optimization



# Social Media Library

- Use pre-built content from Total Expert's social library
- Schedule and publish social posts with ease
- Post educational, industry, and listing content

# Contact Management



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Dashboard	^	, v		ert						
Dashboard Leads & Contacts	^	Selected: 0	÷							
Contacts			Actions	First Name 0	Last Name 🔅	Email 0	Phone Cell 0	Creation Date 🚽	Contacted On ©	User 0
Groups			/	Bonnie	Smith	bs@totalexpert.com	(546) 656-7898	07/27/2020		Jared White
Settings	~		/	Jonathan	Winters	jon@totalexpert.com	(843) 452-6543	07/27/2020	07/27/2020	Jared White
Co-Marketing Partr	vers		/	Shannon	Donest	ShannonDonest@UMNfake.Edu	(763) 444-4444	07/21/2020	07/22/2020	Katie Phillips
Activity Stream			/	Ted	Williams	twilliams@te.com	(508) 555-5555	06/24/2020	07/27/2020	Katie Phillips
Tasks	~	0	/	Daniel		Dani@Sample.com	(904) 333-9999	06/18/2020	07/27/2020	Katie Phillips
Listings & MLS Data	• •		/	Barry		BRaddatz@none.com	Raddałz	06/18/2020		Katie Phillips
Campaigns	~			Robert	C. B. A.		(763) 222-2222	06/17/2020	07/27/2020	Kable Phillips
Lead Capture Apps				Robert	Gallagher	Bobg@noemail.com	(763) 222-2222	06/17/2020	01/21/2020	Kabe Philips
Print Marketing	ř		/	в		TotalExpert				Search all contact
Web Marketing	ř		/							
Email Marketing	ř		/	Ð	+					
Reporting	ř		/	18						
			/	ĸ		Group Name 🗦		Description	¢	
			/			Sphere of Influence		Past clients (	Contacts within	n your personal n
			/	- i*		Sphere of Initiaence		Tast citerits v	contacts within	ryour personarm
						VIPs		VIP past clier	nt, given a refe	rral
				辺		New Buyer Lead		Brand new b	uyer leader	
						New Seller Lead		Brand new se	eller leader (te	mporary)
				-8.						
						Cold Lead - Never Purchased		Leads that n	ever converted	l (post 8 months)
				<b>e</b>		Top Cients				

# Lead and Contact Management

- Input your database into Total Expert
- Group and manage clients
- Track and manage shared leads with your lending partners
- Get loan status updates for each transaction

Classic Email Editor Save Email Pr	noise -
Email Settings	Message Body
Name	File - Edit - View - Insert - Format - Table -
test	今 命 範 Formats - Verdana - 14px - B I 臣王王 ■ 田 · 田 · 田 · 田 · 田 □ @ 国
Subject New Email - 2023-01-17 20:34:35	Great Meeting You at the Open House!
Description	Hey {{recipient.f_name}}!
Preheader Text ()	Thank you for stopping by the open house at 1234 Main Street this past week. It was great to meet you and learn a bit about what you're looking for in your next home!
	If you have any questions about the property, the neighborhood, or the home-buying process in general, I'm happy to help. I'd also love to hear more about your goals to see if there are other homes that might be a great fit.
Thumbnail Choose File No file chosen	Are you currently working with a lender? If you need any recommendations or would like help getting pre-approved, I have a few trusted contacts I can connect you with.
Append Email Signature	Feel free to reply here or call/text me anytime at 8053383815.
	Thanks again for stopping by—I hope we can stay in touch!
Compliance Notification Settin	ngs Best,
Compliance Notification Threshold How many emails can be sent before notifying "Complian	
How many emails can be sent before netrying "Complian Recipient(s)"	
0	
Compliance Notification Recipient(s) Who should be notified?	
	Bobbi Jo Dallas
Sections	Total Expert
BombBomb	0
Layout	
Simple Text	0
Base Email	

# **Email Marketing**

- Create custom emails that are timely, relevant, and personal.
- Send emails directly from the platform and schedule them out in advance
- Track engagement and interaction

Getting Started in Total Expert



## Setting up your TE account

	-27		and countribuids. Contrology		ionon-up easier.
Brand Building Tools Simplify Conta Grow your brand with single property Total Expert CRM besites, co-branded flyers, postcards, time with your clier	Antact Management Metes you spend more lisins, and less time with echnology.	Open House Automation Increase the effectiveness of your Open Houses by making registration and follow-up easier.	MLS Information Ge	 eneral Info	3 Images
Let's get started s	setting up your	Fotal Expert account.	Great! Let's finish setting up your acco info	ount b ormatio	y adding your agent lic on.
	have an account? Click		Providing this information allows both you and your co-ma co-branded marketing assets faster.	arketing p	partners quick and easy access to
Please enter information to set u			License Number (optional)		
Some information has been pre-populated for you.	op your account.		MLS Agent ID (optional)	- <sub>0</sub>	MLS Agent ID is used to automatically bring in MLS listings when creating marketing content in Total Expert.
Email Address bobbijodallas+comarket@gmail.com			MLS Association (optional)		To provide or update this information, pleas contact Total Expert Customer Support
Create Total Expert Password			Select association name	- L	at support@totalexpert.com.
Create Iotal Expert Password		ord must: a minimum of 8 characters long tains 1 lowercase character	MLS Association Not Listed		
Confirm Total Expert Password		itains 1 uppercase character tain 1 number tain 1 special character			
	©	com i specio citorolle!			Co
I authorize collaboration partners to edit my profile info	information (Collaboration partr	ers will not have access to your contacts).			
			Interested in exploring the Total	l Evnert	platform? Click here to sign in

Create login and password

Add MLS agent ID and Association

## Setting up your TE account

MLS Information General Info Images	Brand Building Tools     Simplify Contact Management     Open House Automation       Grow your brand with single property websites, co-branded flyers, postcards,     Total Expert CRM lets you spend more time with your clients, and less time with     Increase the effectiveness of your Open Houses by making registration and
Let's add some general information to your profile.	and EDDM mailers. technology. follow-up easier.
This information will help to provide a detailed description of you when you or your partners create marketing assets within the Total Expert platform.	
First Name	
Bobbi Jo	
Last Name	MLS information General Info Images
Card	inges
Company	I all a del anno la serve te serve e Cla
Total Expert	Let's add some images to your profile.
Address	These images will be used on any marketing and co-marketing collateral that you or your partners create within To
1600 Utica Avenue S. Ste 800	Expert platform.
Suite / Unit / Building / Floor / Other	Profile Photo Allowed types are jog, png, gif (max 1MB) Allowed types are jog, png, gif (max 1MB)
	TotalExpert
City	
St. Louis Park	Click to upload
State	
Select state.	
Zip Code	
55416	
Job Title	Click to upload
Real Estate Agent	
Office Phone	Previous

**Check Profile Information** 

Check Headshot / Logo

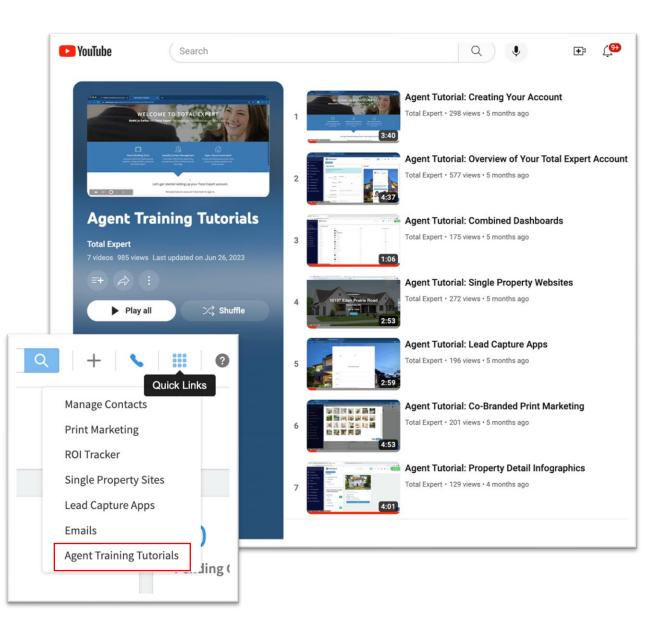
# Agent Resources



# Help Desk

TotalExpert		TRAINING RESOURCE CENTER VIE	EW TICKETS	UBMIT A TICKET
	How can w	e help you to	oday?	
L. User Guides	Best Practices	Training Resource	e Center	When to Use Which Resource
-   💊   🏭   (	? User	Knowledge Bas	e	
Help Center	2 <sub>0</sub>	PRODUCT USER GUIDES		BEST PRACTICE VIDEOS
Help Desk	ମିଳା	CAMPAIGN BUILDER	۲ <u>]</u>	CAMPAIGNS
Product User Guide	s			
Blog				

# YouTube Training Videos



## Customer Support

