Daily Activities to Drive Success in Total Expert

TotalExpert®

TotalExpert

LO Success Plan

Daily Schedule	Activities	Tutorial	Mon	Tues	Wed	Thurs	Fri	Notes
Dashboard Review (15 minutes)	• Review new contacts/leads, group accordingly, create a follow-up plan, and write down any notes • Reach out to upcoming birthdays for the week • Review activity stream/emails that have been opened • Finish any outstanding tasks for the day	• Dashboard overview • Contact record deep dive • Contact management • Managing groups • Reviewing your activity stream • Client birthdays	❑	❑	❑	❑	❑	
Pre-Approval Follow-Ups (30 minutes)	• Follow-up with expiring pre-approvals • Touch base with any clients who are pre-approved but haven't found a home yet • Create a repeatable playbook for staying on top of your pre-approved clients	• Pre-approval playbook	❑	❑	❑	❑	❑	
Customer Intelligence Alerts (30 minutes)	• Review Cust calls and log • Review rate calls, texts, • Review equi calls, texts,			❑	❑	❑	❑	
Referral Partners	• Create reso listings • Make 2-3 agent calls (prospective or current agents) and log outcomes • Invite 1 new co-marketing partner per week	relationships • Send CMP invite	❑	❑	❑	❑	❑	
Monthly Marketing	Activities	Tutorial	Wk. 1	Wk. 2	Wk. 3	Wk. 4	Wk.5	Notes

Weekly Database Email	• Send three emails a month to different parts of your database:
	  • Leads/prospects
	  • Past clients
	  • Agents or partners
		• Agent email
		• Managing groups
		• Creating pipeline views
			❑	❑	❑	❑	❑	

Social Media	• Schedule 3-4 social media posts for the month	• Schedule social media posts • MLS listing social posts	❑	❑	❑	❑	❑	
Referral Partners	• Set up 2-3 face-to-face agent meetings this month	• Agent meetings	❑	❑	❑	❑	❑	

Update slide with edited Daily Success Plan

1

Dashboard Review

The Dashboard

Provides a concise overview of key information about platform activity at a glance.

Best Practices:

- Review new contacts/leads, group accordingly, create a follow-up plan, and write down any notes
- Reach out to upcoming birthdays for the week
- Review activity stream/emails that have been opened
- Finish any outstanding tasks for the day

"Total Expert gives me a roadmap of what to do each and every day. The dashboard outlines everything for me: who's in my pipeline, what's funded, who has a birthday, and who's opening emails that have gone out. It develops my plan for me."

Top LO from Prosperity
(> 50M Production in 2024)

2

Pre-Approval Follow Up

Staying On Top Of Your Pre-Approvals

Don't miss out on potential opportunities. Follow up and nurture pre-approvals to ensure they return to you when the time is right.

Best Practices:

- Follow-up with expiring pre-approvals
- Touch base with any clients who are pre-approved but haven't found a home yet
- Create a repeatable playbook for staying on top of your pre-approved clients

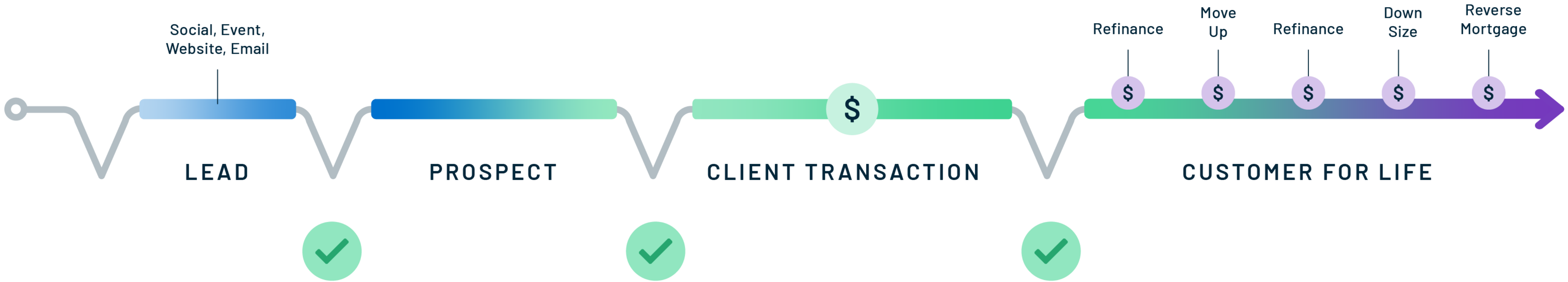
"At any moment in time, I have the ability to go back into the system, review my notes, and refresh my mind on the relationship so that I can have more meaningful conversations with the client."

Top LO from Fairway
(>25 M Production in 2024)

3

Customer Intelligence

Gaps in the Customer Journey Are Costing You Millions



Intelligence + Action

Data

An enriched, comprehensive customer profile

Insights

Actionable intelligence that continuously surfaces intent based alerts and opportunities to help customers.

Action

Hyper-personalized, multi-channel journeys that combine digital and human engagement

Maximize Opportunities with CI

Get notified when the system identifies critical moments to engage in high-quality opportunities.

Best Practices:

- Review Customer Intelligence tasks – make calls and log outcomes
- Review rate opportunities – make phone calls, texts, or emails, and log outcomes
- Review equity opportunities –make phone calls, texts, or emails, and log outcomes

"With the credit inquiry alert in Total Expert, I've had success with a simple text. The client seems more likely to engage. I've been able to recapture past clients with that approach, I'm not sure I would have got that with a different approach"

Top LO from Lake Michigan Credit (>220 M Production in 2024)

4

Referral Partners

Build relationships with your referral partners

Utilize Total Expert's marketing and co-marketing tools to support your agents' listings.

Best Practices:

- Create resources for your agents' new listings (listing alerts)
- Make 2-3 agent calls (prospective or current agents) and log outcomes
- Try to set up 2-3 agent in-person meetings every month
- Invite one new co-marketing partner per week
- Send weekly/monthly emails to agents to build your relationships

"Every Friday, we send out an 'I'm working this weekend' email from Total Expert to all of our realtors, and we pick up a deal every single weekend just from these emails. If I send that email, my phone is ringing —no question. In under 5 minutes, I can go into the system and schedule these out for the whole month. It's so simple."

Top LO from Fairway
(>60 M production in 2024)

5

Monthly database outreach

Consistently stay in front of your database

Stay in regular contact with your database to ensure they turn to you for their next financial transaction.

Best Practices:

- Leverage Pipeline Views to stay on top of our database
    - Daily power hour – calling clients/update calls
- Quickly and easily engage with your database in a consistent manner
- Wednesday knowledge bomb
- Send three emails a month to different parts of your database:
    - Leads/prospects
    - Past clients
    - Agents or partners Send weekly/monthly emails to agents to build your relationships

"I pick a different group every day and then my team and I sit down for a disciplined power hour where we make as many calls as we can with the goal of getting in front of as many clients as possible."

Top LO at Intercap Lending (>45 M production in 2024)

6

Social Media

Expand your reach with social media

Build your brand and your exposure with social posting in Total Expert

Best Practices:

- Schedule 3-4 social media posts for the month
    - Holidays
    - Industry updates
    - Agent's listings
- Check regularly for new content

"When one of my agents has an open house, it takes me less than three minutes to create a single property website and a flyer that I can then post on social media and tag them... now that's powerful."

Top LO from PRMG
(>20M Production in 2024)