



Leveraging Your Supporting Actors to Drive Higher Adoption

Table of Contents

Best Practices for Branch Managers.....	1
(Over) communicate with your team about Total Expert updates and news.....	1
Send weekly / monthly encouragements to your team via Bombbomb or Vidyard	2
Leverage the Marketing Overview Report to review your teams’ adoption of the Total Expert platform on a reoccurring basis.....	2
Review your team members’ dashboard in Total Expert on a reoccurring basis	3
Quarterly Strategy Session with marketing support for that branch	3
Best Practices for Loan Officer Assistants.....	4
Manage Focused Views on behalf of the Loan Officer	4
Turn on the Daily Digest for your Loan Officer	4
Send Co-Marketing invitations on behalf of your Loan Officer	4
Schedule social media posts for your Loan Officer	4
Create a Co-Marketing kit for every new listing from an agent	5
Best Practices for Marketing Coordinators.....	5
Connect and communicate with your LOs / LOAs about new content	5
Reoccurring trainings with LOs / LOAs / Support / Trainers	5
Steering committee for RMC/Trainer & LOs to provide feedback.....	5
Quarterly branch manager meeting to discuss new features, reporting, and identifying areas of opportunity in each branch.....	6
Reach out for support when you need it.....	6

Best Practices for Branch Managers

(Over) communicate with your team about Total Expert updates and news

Best Practices for Branch Managers:

- Relay information and communications from the marketing team
- Create a marketing section in your standing team calls where you highlight marketing/Total Expert updates, upcoming training, events, etc.

**Best Practices for Marketing:**

- Make sure your branch managers are receiving and relaying marketing information
- Send out an exclusive branch manager newsletter that highlights important info they need to share with their team
- Create an email template that branch managers can use to send out weekly/monthly updates

Send weekly / monthly encouragements to your team via Bombbomb or Vidyard

Best Practices for Branch Managers:

- Pick a consistent time and cadence for your email send (ie. first Monday of every week or month)
- Log into Total Expert and create a manual email using the video email template
- Make sure all of your team members are added as contacts and into a group in your account

Best Practices for Marketing:

- Help Branch Managers with setting up their team/group in their account
- Create a quick video tutorial on how to send a video email
- Make sure you have video email templates created for your branch managers

Leverage the Marketing Overview Report to review your teams' adoption of the Total Expert platform on a reoccurring basis

Best Practices for Marketing:

- Ensure that all branch managers have access to the Marketing Overview Report (permission setting) and are trained on how to use the tool
- Work with branch managers on their strategy for analyzing and taking action on the report based on the adoption numbers
 - Determine the categories to filter by
 - Determine the threshold that causes action
 - *Examples:*
 - If logins are less than 5... then what?
 - If social media is less than 2...then what
- Encourage branch managers to set up a monthly strategy meeting with each loan officer to review their adoption in Total Expert

Example Branch Manager Strategy:

- Logins:
 - If logins are less than 5 in that month, encourage the user to attend monthly trainings, reach out to the marketing team for additional training, and/or send resources from the Training Resources Center to the user for additional support
- Contacts:
 - If the user hasn't taken in a new lead / new agent relationship in the last month, reach out to have a conversation with that user to understand why they don't have any new contacts
- Connections Sent / Connections Accepted:



- If connections accepted is less than 3, come up with a strategy to target their top 5 agents and get them to become co-marketing partners
- Emails Sent:
 - If emails sent are lower than 50 in the last month, have a conversation with those users
 - Ask why? How are they currently communicating?
 - Review Journeys and encourage them to turn on Journeys*
- Approved Social Media:
 - If approved social media is less than 2, have a conversation with the user around their social media strategy and when/what they are posting
 - Encourage users to use social media to promote their personal / company brand
- Active Sites / Active Landing Pages / Print Downloads
 - If any of these numbers are 0, encourage users to attend training or reach out to the marketing team for additional training, and/or send resources from the Training Resources Center to the user for additional support

Review your team members' dashboard in Total Expert on a reoccurring basis

Best Practices for Marketing:

- Work with branch managers on their strategy for analyzing their team's dashboard numbers
 - Determine which dashboard tile are most impactful for your branch managers to review with their loan officers
 - Determine your organization's threshold
 - Examples:
 - Review their open tasks dashboard tile
 - If they have over 3 open tasks, reach out to make sure they are taking action on Journey tasks
 - Review new contacts on the dashboard tile
 - If they have over 3 new contacts, reach out to make sure they have a strategy for reaching out to these individuals
- Encourage branch managers to review each loan officers dashboard on a weekly cadence and provide feedback to team members

Quarterly Strategy Session with marketing support for that branch

Best Practices for Branch Managers:

- Meet quarterly with all marketing support staff for your branch
- Review marketing and operational strategy
 - Review previous quarter activity
 - Highlight upcoming quarter initiatives
 - Set goals

Best Practices for Marketing:

- Share company quarterly goals with branch managers to align with branch goals
- Share marketing initiatives with branch managers to align branch initiatives



Best Practices for Loan Officer Assistants

Manage Focused Views on behalf of the Loan Officer

Best Practices for LOAs:

- Manage your loan officer's Pre-Approval FV and Pre-Approval Expiration FV
- Leverage Total Expert's example call script in the [LOA best practice playbook](#)
- Mark an outcome from each action taken, keep detailed notes in the contact record, and assign a follow up task if necessary

Best Practices for Marketing:

- Create a Pre-Approval Focused View and a Pre-Approval Expiration Focused View, if you have not already.
- Enable for all loan officers

Turn on the Daily Digest for your Loan Officer

Best Practices for LOAs:

- Ensure the Daily Digest is turned ON for all the Loan Officers you are supporting
- Create a strategy around the Daily Digest and who is going to action off of what pieces of information in the Digest
- Set up an inbox forwarding rule so that you receive your Loan Officers Daily Digest

Best Practices for Marketing:

- Work with CSM to turn on the Daily Digest for all loan officers, if you wish
- Help LOAs set up an inbox forwarding rule – create tutorial video
- Provide an example strategy for how LOAs and LOs can work together on the Daily Digest
 - LO - send birthday BombBomb to all upcoming birthdays, reach out to new contacts
 - LOA – review recently engaged contacts, loan anniversaries, tasks

Send Co-Marketing invitations on behalf of your Loan Officer

Best Practices for LOAs:

- Work with your loan officer to create stack-ranked agent list (A, B, C)
- LOAs reach out to agents – helping sign them up and train agents on the platform
- Meet with agent 1:1 and teach them how to use Total Expert using our [LO to Agent Co-Marketing Kit Presentation](#)
- Email the buyer's agent and seller's agent on every recently funded loan using the provided email in the [LOA Playbook](#)

Schedule social media posts for your Loan Officer

Best Practices for LOAs:

- Create a social media strategy with your loan officer to determine timing and cadence of post
- Post SPS websites to social media on behalf of Loan Officer every time an agent has a new listing –and tag the agent



- Set up a reoccurring task for the first Monday of every week (or first Monday of every month) to schedule social media posts for your Loan Officer

Best Practices for Marketing:

- Create at least one new piece of social media content per week
- Notify LOs and LOAs when new content is uploaded into Total Expert on a weekly basis

Create a Co-Marketing kit for every new listing from an agent

Best Practices for LOAs:

- Reach out to your loan officer's connected Co-Marketing Partners about upcoming open houses once a week
- Set up a mailbox forwarding rule to make sure they get their loan officer's CMP listing alerts
- Create a marketing kit for each upcoming open house / new listing: this could include open house LCA, print asset, and Single Property Website
- Email the kit to the agent
- Create social post announcing the new listing and tag/congratulate the agent

Best Practices for Marketing Coordinators

Connect and communicate with your LOs / LOAs about new content

- Marketing teams should be constantly building new content (social, brochures, email, print, etc.)
- Marketing coordinators should be following up on messaging and promoting new content

Best Practices:

- Use video to promote content / get the word out
- Share recommendations on when / why to post certain pieces of content (ie. Halloween social graphic)

Reoccurring trainings with LOs / LOAs / Support / Trainers

Best Practices:

- Whenever something is new, added or updated – train your team!
 - Examples:
 - If you create a new Focused View, train your team!
 - If you create new content, tell your team!
 - If there is a new Journey – definitely train your team!
- Utilize self-serve engagement kits on the Knowledge Base to train your team
- Share success stories with your team about other loan officer's success to drive engagement

Steering committee for RMC/Trainer & LOs to provide feedback

- Marketing coordinators / trainers identify vocal loan officers who will offer good feedback
- Create a monthly or quarterly cadence to meet with group of loan officers (or meet 1:1) and gather feedback

Best Practices:

- Depending what is better for your group, you can meet 1:1 with loan officers or meet as a group



- Make sure you communicate your findings to the marketing team and follow up on status of feedback each meeting
- Create a consistent cadence of meetings (either monthly or quarterly)

Quarterly branch manager meeting to discuss new features, reporting, and identifying areas of opportunity in each branch

- Marketing coordinators should try to meet with branch managers on a reoccurring basis to better understand their workflow and branch strategy
- Discuss topics such as new features, reporting, and opportunity areas for each branch

Best Practices:

- Schedule a reoccurring meeting with your branch managers so the meetings don't fall off the calendar (ie. first monday of every third month)
- Start each meeting by covering accomplishments from last meeting to show progress and accountability
- Make it interactive and fun!

Reach out for support when you need it

- There are many different support channels available to you if you don't know the answer

Best Practices:

- Talk internally before you reach out externally
 - Use other marketing coordinators to ask questions or brainstorm
 - Lean on your marketing team for support
- Leverage TE support via phone, chat, email
 - Be as detailed as possible and include screenshots whenever possible