

# Expert Content Strategy Guide

*Referral Partner - LO to Agent*

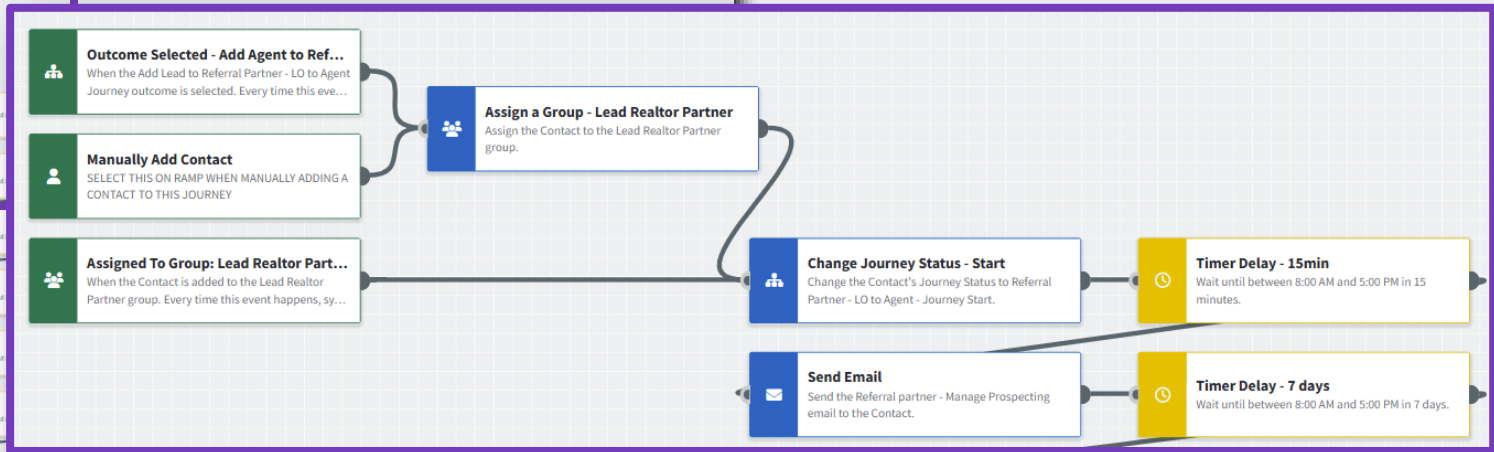
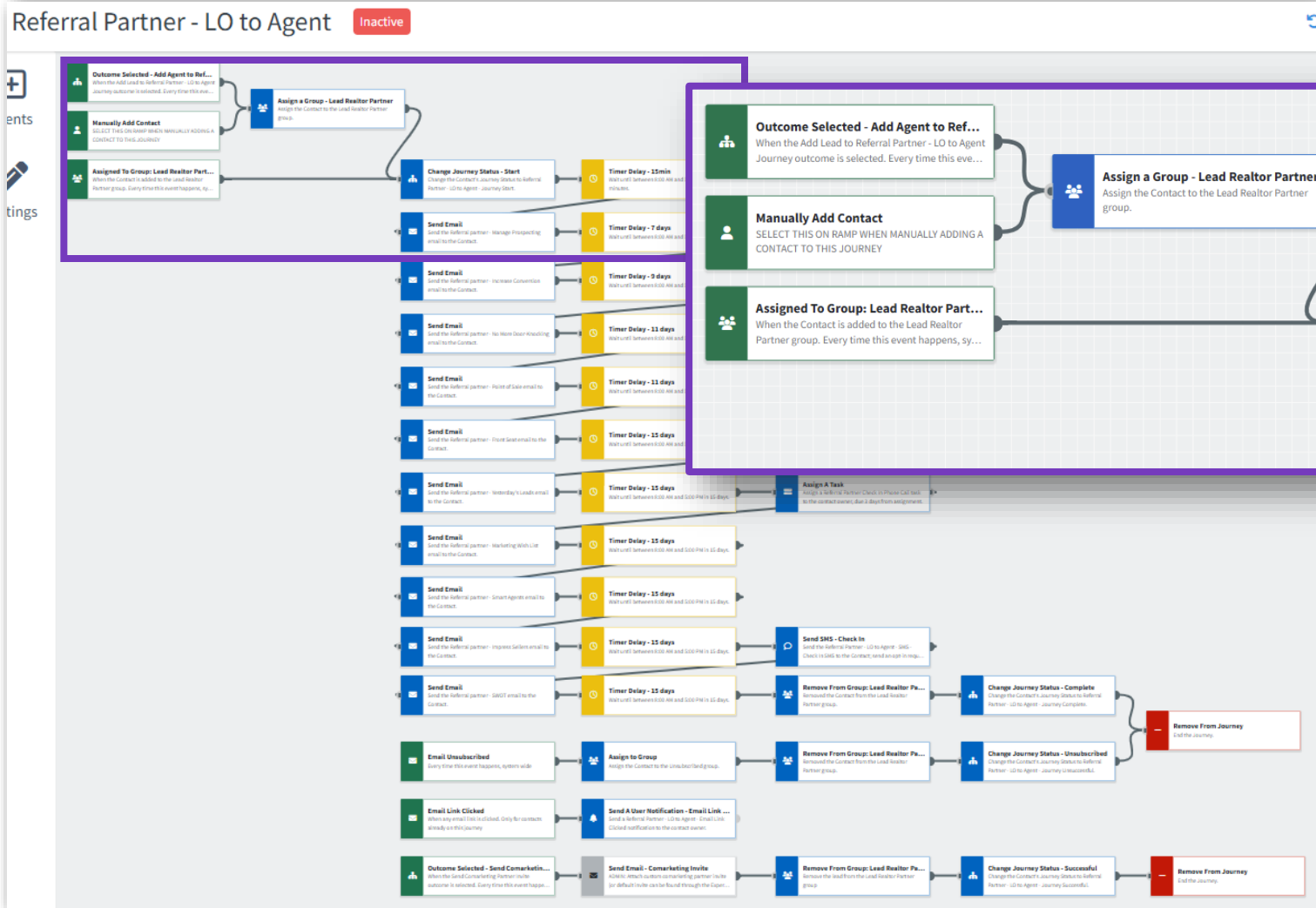


# Referral Partner - LO to Agent

Email, SMS, Task, User Notification

Ten emails and three SMS are sent from a loan officer to a lead referral partner over the course of several months. The journey encourages the potential referral partner to engage in comarketing activities leveraging a free Total Expert account. Topics include various comarketing tools provided through the platform, benefits of working together on leads and current customers, and ways the loan officer and agent can combine efforts to increase both of their conversions. Two tasks are assigned to the loan officer to reach out directly to the prospective partner and encourage them to sign up.


\*All communications should be reviewed prior to initiating the journey.



### Journey Map Notes:

- Adjust onramps with organization specific groups and Focused View outcomes.
- The offramp for an interested agent can automatically send the comarketing invite, if configured. Attach custom comarketing partner invite (or the default invite can be found through the Expert Content Email Gallery: Email Marketing > Emails > Create Email > Expert Content > Search "Invitation to Collaborate").

# Referral Partner - LO to Agent



Dear Teddy,


Some days you'll find yourself showing homes, putting out fires and preparing offers...with no time to manage your prospecting and lead generation efforts. If you've ever lost a prospect or listing because you were too busy to follow up quickly, let's talk.

I can help you by providing RESPA-compliant materials and tools that automate your follow-ups and lead nurturing. They're simple to use and even help you bump up your social media presence.

Call me to learn more or [check out this two-minute video introduction](#).


Sincerely,  
Media Team


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**Media Team Admin**  
NMLS#: 12345  
Office: (123) 456-7890 | Cell: (888) 888-8888  
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**Expert Content**  
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Dear Teddy,

How would you rate your lead management skills? If you think you have room to improve, let's talk about increasing your conversions without increasing your efforts. Really.

Would you like to deliver targeted, relevant content for all of your leads, from as many different sources as you'd like? I can help—just call me to get started. Or [click here for a two-minute preview](#) of the lead conversion tools available to you.

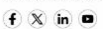
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Dear Teddy,

Do you tell your neighborhoods about your new listings—and yourself—as often as you'd like? It's easy when you send everyone colorful, attractive postcards that are also RESPA-compliant.

[Click here to learn more](#) about Every Door Direct Mail (EDDM) postcards and other co-marketing tools.

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Hello Teddy,


The next time you hold an Open House, make sure you max out your sales opportunities with:

- Websites for each of your listings that also promote them on social media
- Beautiful, branded flyers with MLS data
- A sign-in application that captures visitors' information for your CRM or files
- Automated follow-up campaigns that help build relationships

[Click here for a two-minute preview](#) of these and other marketing tools that are easy to use and proven to be effective.


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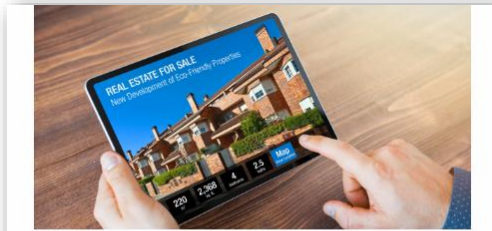


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## Email Subject:

- Manage prospecting 24/7 with my help.
- Increase your conversion without increasing your effort
- Say hi to the neighborhood without door-knocking.
- Open House = Point of Sale

# Referral Partner - LO to Agent




Dear Teddy,

Are you creating websites for every one of your listings? Can you share MLS information across all of your social media at the same time? If you can't answer "yes", let's talk.

Property listings are some of the most popular content on social media. Together, we can create single property websites that work well with other marketing tools we can share. [Click here for a two-minute video preview.](#)

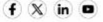
Call me to learn more, or to get started.


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Hello Teddy,

Do you wonder about potential leads that didn't convert quickly? Do you have dormant leads on file, or in your CRM? Let's check in on them together.

Chances are, some of them are rethinking their home ownership options, which means it's an ideal time to re-introduce yourself.

I can help you improve your lead management skills quickly, so you can check in on all your leads—including the older ones—without any additional effort on your part. Call me to learn more, or [click here for a two-minute video preview.](#)


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Dear Teddy,

What if you could cover all of your marketing bases at once—affordably and easily? Together, we can:

- Deliver relevant, targeted messages to prospects and past borrowers
- Create websites for each of your listings and post them on your social media
- Transfer your Open House sign-in sheet details to your pipeline instantly


[Check out this two-minute video to learn more.](#)

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Dear Teddy,

Did you know that direct mail is still popular with prospects, from Gen Zers to Boomers? Better yet, a coordinated campaign that uses both direct mail and email will get you a considerably higher response rate than an email campaign. (Source: Postalalytics)

I already have access to a library of direct mail materials, including Every Door Direct Mail (EDDM). Let's work together and launch a campaign that promotes your listings and skills, putting you ahead of the competition. [Click here for a preview.](#)

Call me today to learn more.

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## Email Subject:

- Give your listings front row seats online
- Where did yesterday's leads end up?
- Turn your marketing wish list into reality
- Why smart agents aren't afraid of snail mail.

# Referral Partner - LO to Agent



Hello Teddy,

When you tell sellers you've built a single property website for their home, they'll be thrilled! They'll feel that you've put their home up in lights. There are other benefits waiting for you as well, from effective, automated marketing to more referral business.

[Click here for more details](#) or call me so I can help you get started today.

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Dear Teddy,

When you're making plans for your business' future, carrying out a SWOT analysis (Successes, Weaknesses, Opportunities, Threats) can help you see where you may need assistance.

If you determine that you need to improve your marketing efforts, or need professional help with managing your opportunities, I can make a big difference.

Call me so we can discuss your needs and get started. Want a preview first?

[Click here for a two-minute introduction.](#)

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## Email Subject:

- Why impress your sellers when you can delight them?
- Join my SWOT team for a busier future.

# Referral Partner - LO to Agent

## **SMS: Referral Partner - LO to Agent SMS - Let's Connect**

Hi {{contact.f\_name}}, this is {{sender.f\_name}}  
{{sender.l\_name}} from {{sender.company}}. I  
wanted to share a tool called Total Expert. It's a  
fantastic platform I use with my referral partners  
to collaborate and drive more business for each  
other. Let me know if you'd like more info or  
have any questions!

## **SMS: Referral Partner - LO to Agent - SMS - Check In**

Hi {{contact.f\_name}}, it's {{sender.f\_name}} with  
{{sender.company}}. I wanted to check in and  
see if you've had a chance to review the  
information I shared about Total Expert. If you'd  
prefer a call, feel free to reach me at  
{{sender.phone\_cell}}. I look forward to  
connecting soon!

## **SMS: Referral Partner - LO to Agent - SMS - Share a Sample?**

Hi {{contact.f\_name}}, I hope you're doing well.  
I've sent some info about Total Expert via email.  
Would you be interested to see it in action? If you  
sign up, I can create some marketing materials  
for you to use. Let me know if you'd like to  
discuss or if I can send a formal invite!

# Referral Partner - LO to Agent

## **Task: Referral Partner Check In Phone Call**

Please call the below referral partner to check whether they have any questions about Total Expert and signing up to comarket. Let them know some of your favorite tools and resources that you can offer through the platform. If they haven't signed up yet, ask if there's anything you can do to assist. If they've already signed up, ask whether they have had a chance to log in and use any of the features.

Name: {{contact.f\_name}} {{contact.l\_name}}

Phone: {{contact.phone}}

## **User Notification: Referral Partner - LO to Agent - Email Link Clicked**

The potential referral partner below clicked a link within an email on the Referral Partner - LO to Agent journey. It could be beneficial to reach out directly if you haven't already.

Name: {{contact.f\_name}} {{contact.l\_name}}

Phone: {{contact.phone}}