**Presentation Guide:**

**Co-Marketing Presentation**

In this session, loan officers will provide an overview of co-marketing in Total Expert and the benefits to realtors.

PowerPoint

**Agenda:**

* What is Total Expert? ​
* Co-Marketing Overview​
* Key Features  and Benefits
* How to Become a Partner​
* Q&A

Play Co-Marketing Video (2 min)

**What is Total Expert?**

* Total Expert is the industry-leading, purpose-built CRM and customer engagement platform
* Specifically designed to help realtors build their brand and grow their business alongside loan officers

**Co-Marketing Portal in Total Expert**

* Total Expert is available to every real estate agent and anyone in financial services ​
* Partners have access to a FREE version of Total Expert, including a suite of powerful, user-friendly tools ​
* Live, local support is available six days a week

**Co-Marketing Features and Benefits**

**Key features** you will have access to are:

* Print Marketing
* Lead Capture Apps and Open House Automation
* Single Property Websites​
* Email Marketing
* Lead and Contact Management (CRM)

**Branded Print Marketing**

You can also use brochures, flyers, postcards, and other print materials from our on-demand library of customizable marketing assets. These pre-built templates are fully compliant, and you can split the cost with your lending partner.

* Save time and money: Create and mail high-quality, co-branded flyers, postcards, and brochures directly from MLS data and photos in just a few clicks.
* Ensure RESPA compliance: Automatically split costs of print marketing materials with lending partners
* Targeted Distribution: Consistently and easily deploy direct mail to neighborhoods you specialize in with Total Expert’s Every Door Direct Mail (EDDM) capabilities and an integrated mapping feature that eliminates the hassle of creating mailing lists.

**Lead Capture Apps and Open House Automation**

When a potential buyer attends one of your open houses, Total Expert can help you collect their information through digital landing pages.

* Lead gen tool – lead capture apps serve as a lead generation tool that can be used to capture the contact information of the registrants and/or attendees of open house and professional events directly into your account.
* Multiple templates available – in addition to open house and professional events, you can leverage other lead capture app templates to generate leads.
* Capture leads in the platform – all leads generated through lead capture apps are automatically pushed into your Leads and Contacts.
* Automate follow-up – users can automate follow-up communication to leads being generated through lead capture apps.

**Single Property Websites**

When your listing appears on the MLS, you can quickly create a dynamic, co-branded webpage highlighting the listing information and containing a contact form for interested buyers to provide their information.

* MLS Integration
  + Integrated with every MLS Listing
  + Ease and automaton
  + Customizable
* Multi-channel Optimization
  + Ability to promote the property on multiple social medial channels
* Ease of Use
  + It can be created in as little as five clicks!
* High-Quality Marketing
  + High-quality design helps to promote you and your co-marketing partner
  + Far-reaching materials help to make connections

**Email Marketing**

* Create custom emails that are timely, relevant, and personal
* Send emails directly from the platform
* Track email activity
* Leverage pre-built library
* Event follow-up

**Lead and Contact Management**

* Free CRM
* Leverage Total Expert customer support to get your leads imported to Total Expert
* Build customer relationships alongside lending partners by managing your shared leads in one place

**How to Become a Co-Marketing Partner**

* Three easy steps:
  + Call, email, or text

**How to become a co-marketing partner**

Three easy steps

1. Call, email, or text
2. Accept the invitation
3. Start collaborating

**Call, email, or text**

*(add headshot, name, and contact information)*

* Let me know if you want to connect or learn more about Co-Marketing​
* You can reach me M-F, 9 a.m. - 5 p.m.​
* Call, email, or text. Whichever is better for you.

**Accept the invitation**

*(Make sure to send the invitation to everyone who requests)*

* Check your inbox for an invitation​
* The email invitation will come from Total Expert​
* If you don’t get it, reach out to me, and I will resend it to you ​
* Make sure to accept the invitation and set up your profile

**Start Collaborating**

* Explore the different features available to you in Total Expert​
* Check out the Training Resource Center ​
* Questions? Reach out to support, which is available six days a week

**Additional Resource:**

* **Training Resource Center:** Robust library of training content and videos
* **Customer Support:** live, local support agents are available to you six days a week
  + Chat support:
    - 8:00 a.m. to 7:00 p.m. CT Monday - Friday
    - 9:00 a.m. to 5:00 p.m. CT on Saturdays
  + Email support:
    - 8:00 a.m. to 7:00 p.m. CT Monday - Friday
    - 9:00 a.m. to 5:00 p.m. CT on Saturdays