Leveraging Your Supporting Actors to Drive Higher Adoption

Table of Contents

[Best Practices for Branch Managers 1](#_Toc135142575)

[(Over) communicate with your team about Total Expert updates and news 1](#_Toc135142576)

[Send weekly / monthly encouragements to your team via Bombbomb or Vidyard 2](#_Toc135142577)

[Leverage the Marketing Overview Report to review your teams’ adoption of the Total Expert platform on a reoccurring basis 2](#_Toc135142578)

[Review your team members’ dashboard in Total Expert on a reoccurring basis 3](#_Toc135142579)

[Quarterly Strategy Session with marketing support for that branch 3](#_Toc135142580)

[Best Practices for Loan Officer Assistants 4](#_Toc135142581)

[Manage Focused Views on behalf of the Loan Officer 4](#_Toc135142582)

[Turn on the Daily Digest for your Loan Officer 4](#_Toc135142583)

[Send Co-Marketing invitations on behalf of your Loan Officer 4](#_Toc135142584)

[Schedule social media posts for your Loan Officer 4](#_Toc135142585)

[Create a Co-Marketing kit for every new listing from an agent 5](#_Toc135142586)

[Best Practices for Marketing Coordinators 5](#_Toc135142587)

[Connect and communicate with your LOs / LOAs about new content 5](#_Toc135142588)

[Reoccurring trainings with LOs / LOAs / Support / Trainers 5](#_Toc135142589)

[Steering committee for RMC/Trainer & LOs to provide feedback 5](#_Toc135142590)

[Quarterly branch manager meeting to discuss new features, reporting, and identifying areas of opportunity in each branch 6](#_Toc135142591)

[Reach out for support when you need it 6](#_Toc135142592)

# 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 offiers 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](https://totalexpert.freshdesk.com/support/solutions/articles/22000280086-loa-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](https://totalexpert.freshdesk.com/support/solutions/articles/22000280123-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](https://totalexpert.freshdesk.com/support/solutions/articles/22000280086-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