Co-Marketing for Full Accounts

Table of Contents

Introduction

Co-marketing is a feature of Total Expert (TE) that allows 2 separate users to include their contact information on the same piece of marketing material so that both may benefit from the exposure. This is typically a partnership between a loan officer and a real estate agent who both benefit from marketing aimed at people interested in buying a house.

Provided that both users have entered their account information, co-marketed templates automatically display full contact information, a headshot, any relevant logos, and disclaimers.

A user who does not have an account through their organization, such as a real estate agent, can sign up for a free account on the TE website when they are invited to connect by an existing user. The free account is offered by TE and is not provided by the user sending the invitation or their organization.

Once a connection is made, co-marketing partners can share contacts stored in TE and collaborate on email, Web, and print marketing. If any costs are incurred by placing an order for printed materials, both parties must pay their share of the cost according to a predetermined cost share arrangement for the piece before the order is sent to the printer.

Working together on leads and marketing materials enables both users to extend their business to areas they would otherwise not reach. Successful co-marketing partnerships strengthen working relationships.

Note
No existing contacts are shared between users when a connection is made. Sharing (or assigning) contacts is done manually. A new contact captured by co-marketed Web marketing is automatically shared with both users.

Commonly Used Terms

Name	Description
co-marketing partners	TE users who have linked their accounts to share contacts and collaborate on marketing. Most partnerships are between a free account and a full account. Any combination is allowed, but a user with a free account cannot invite another user.
free account	An account used by an independent co-marketing partner. An account of this type has fewer features and generally more restricted options, but can be upgraded to a paid individual account with access to even more tools, but there is no obligation to do so. The user can keep their account (including any connections and stored contacts) even if they change organizations. A free account is not part of any organization in the TE platform. Because TE—not the partner's organization—provides these free limited accounts, the organization is compliant with rules that prevent providing something of value.
full account	Any account that is part of an organization of licensed Total Expert users. Due to differences in each organization's setup and between roles within an organization, not all full accounts include the same features, but they are generally have access to more than a free account. The user can share selected marketing templates with a co-marketing partner, even if they are using a free account.

Inviting a Partner to Connect

Tip

TE recommends that you have a conversation with a potential co-marketing partner before sending them an invitation. That way, you can explain the benefits and respond to any concerns they have before simply initiating a connection. The Co-Marketing Partner Flyers at https://totalexpert.com/engagement-resources/ may be helpful.

To send a co-marketing request:

1. Create the person as a contact in your contact list.
    a. Click the **Add Contacts & Connections** button (plus symbol) in the header of any page and select **Create Contact**.
    b. Enter as much information as you have about the person. At a minimum, you must provide first name, last name, and email address.
    c. Click the **Save** button at the top of the page.
2. Select **Co-Marketing Partners** from the navigation menu.
3. Click the **Invite New Connections** button at the top of the page.
4. In the Create Co-Marketing Connection(s) dialog box, begin typing the name of the contact you just added.
5. Select the name from the drop-down menu when it appears.

Note

You can also enter the email address of someone who is not stored as a contact here. You can also add more than 1 recipient to initiate multiple connections at once. Each recipient will receive a unique email with a unique connection link and be added to your contact list.

6. Click the **Next** button.

7. (optional) Customize the invitation email.
8. Click the **Send Invitation** button.

The dialog box closes and the Co-Marketing Partners page refreshes. The person you just invited is listed with the status *Pending - Email Not Delivered*. You can check back here periodically to track the progress of your request.

- When the email goes through, the status changes to *Pending - Email Delivered*.
- When the person opens the email, the status changes to *Pending - Email Opened*.
- When the recipient creates a TE account or connects their existing account, the status changes to *Active*.

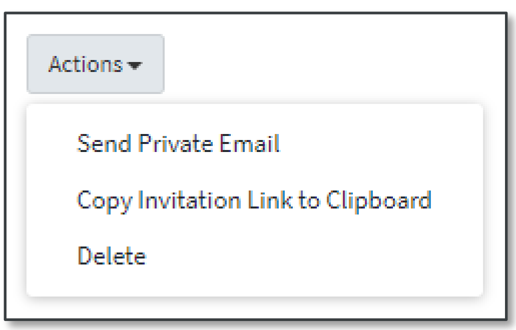
Tip
If you speak with the person you are trying to co-market with, and they have not seen the email, have them check their spam folder. The message is listed with the requester's name in the From field and has the subject line "[first name] Invited You to Co-Market on Total Expert!"

Note
You can also request one or more connections from the contact list page by checking the boxes for the contacts and selecting **Actions → Invite to Co-Market**. You then only have to customize and send the invitation.
It is advisable to send connection requests only to a small number of contacts at a time, and only to those you already have a working relationship with or have spoken with about collaborating through TE.

If the recipient loses the initial email, you can send them a new copy from the Co-Marketing Partners page by selecting **Actions → Send Private Email**. They also receive reminder emails after 3 and 7 days if they have not signed up yet.

If you meet with the recipient privately, you can have them accept your request on your device without needing the email. In this case, select **Actions → Copy Invitation Link to Clipboard** and paste the URL into a new browser tab. Then have them follow the instructions in *Co-Marketing for Free Accounts*.

Warning
Do not use this link to fill out the registration form on the recipient's behalf. A user must create their own account.



Warning
In all cases, TE generates a unique link for each co-marketing invitation. Do *not* copy the same link to share with multiple people. Each link will only work for the person it was created for.

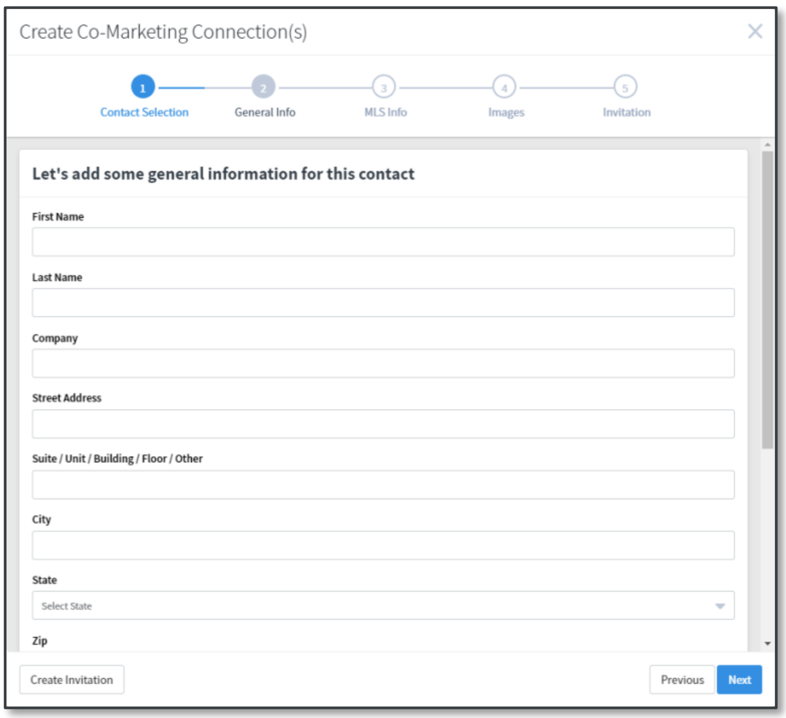
When the recipient creates a TE account, the status changes to *Active* and a progress bar appears, indicating how complete their profile information is. Hover the mouse pointer over this bar to see a list of the missing information. You also receive an email notification that your invitation was accepted and you are now connected. You will also receive email updates when your connected partner updates their profile.

If Your Organization Allows Edits to Co-Marketers' Profiles

Each organization has the opportunity to allow whether or not a user inviting someone to be their co-marketing partner can set up initial values for the invited user's settings. This is controlled by an organization setting.

If this profile setup is allowed, once you select a contact to invite, you will see additional steps prior to customizing the invitation email. Here, you can add general contact information, MLS information, and images for the invited user's profile and company logo.

Note
This is only possible when a single contact has been selected. If 2 or more contacts are selected, you will proceed directly to customizing the invitation email, even if your organization allows setting up partner profiles.



Any information you provide will be pre-filled on behalf of your partner when they create their account. They can add or change any information while signing up or at any time after logging in.

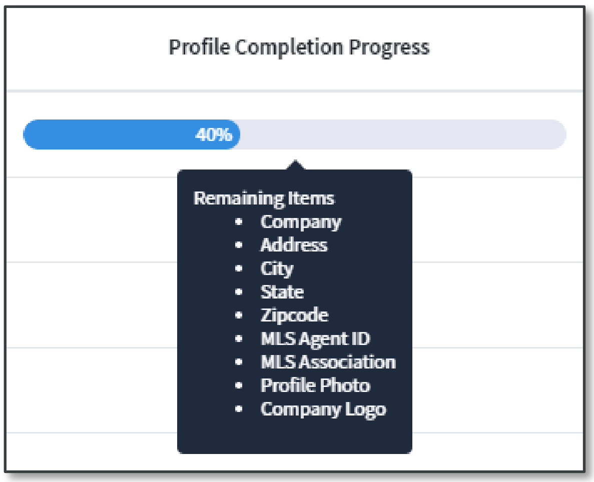
Tip
If the person does not have a TE account, provide as much information as you can to simplify the setup process for your co-marketing partner. If the person you invite already has a TE account, information you provide will not change their existing profile.

Once a Connection Is Made

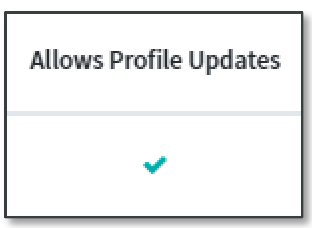
When your new co-marketing partner creates an account by following the link in your invitation email, the connection is made automatically and you are notified by email.

Partners Page

Select **Co-Marketing Partners** in the navigation menu. This includes a list of all the pending and active connections with your account. The Profile Completion Progress column indicates how complete a connected partner's profile information is; you can see exactly which fields are empty by hovering your mouse pointer over the progress bar. If all fields are complete, the column displays the label Completed in this column.

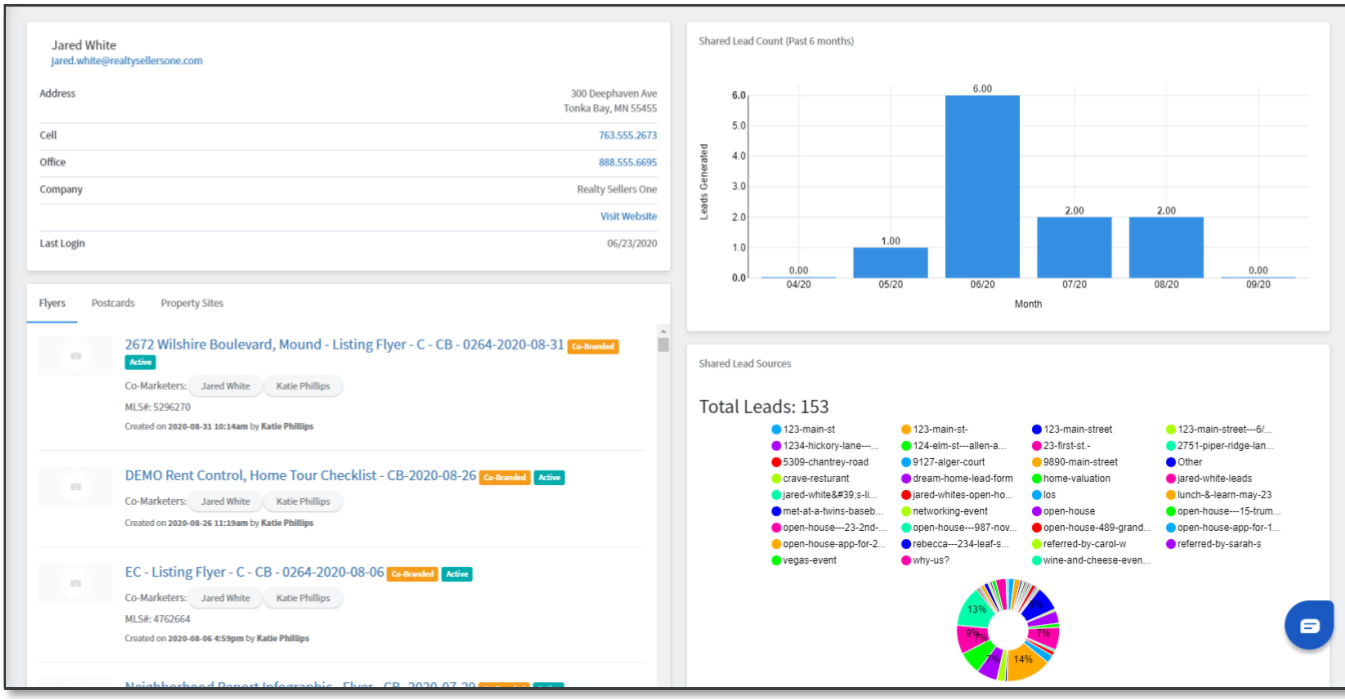


If your organization allows you to edit your co-marketing partners' profile information and the individual partner has allowed you to edit their profile (indicated by a checkmark in the Allows Profile Updates column), you can select **Actions → Edit** for that partner to edit or fill in their profile. The partner can give or revoke this access at any time from their account.



Once you have had some collaboration with your co-marketing partner, click their name on the list to see a report of shared leads and marketing activity.

Tip
Use this to help evaluate each partnership to determine whether it is worth maintaining.



Select **Actions → Delete** from the partner list page if you ever feel you need to terminate a co-marketing partnership in TE. While a connection can be remade if it was deleted prematurely, deleting should only be used as a last resort. You will not be able to review the details of a deleted connection.

Sharing Contacts

Either partner can share, unshare, assign, or unassign their contacts with the other.

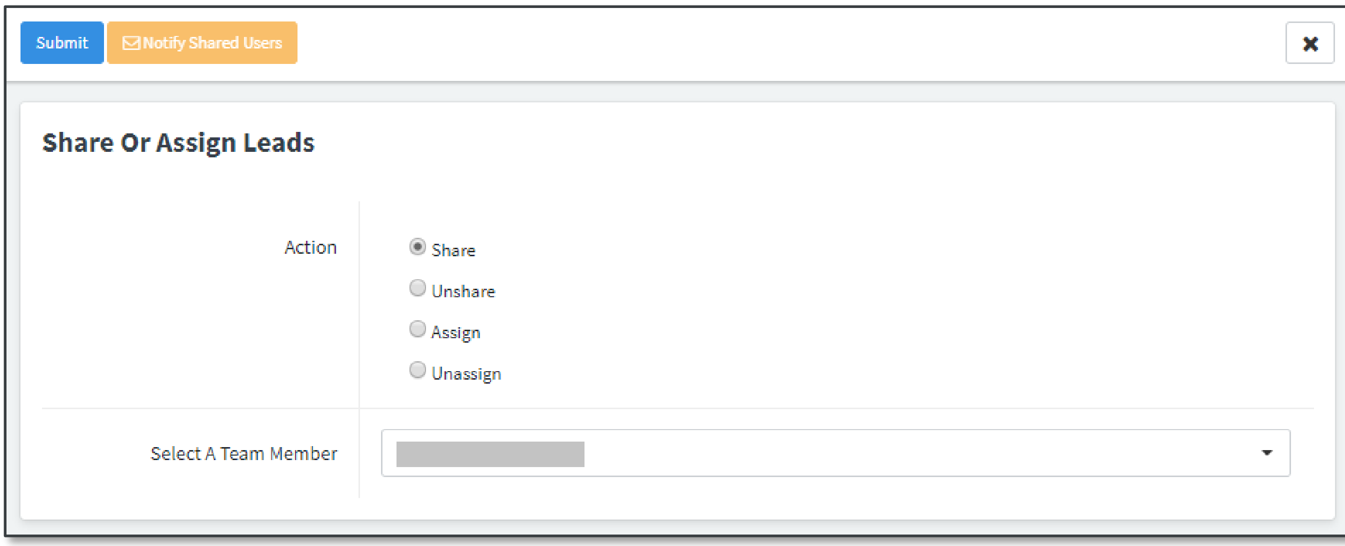
1. Navigate to **Leads & Contacts → Contacts**.
2. Check the contacts to share.
3. Select **Actions → Share With User**.
4. In the slide-out panel, select the **Share** option.
5. Select the co-marketing partner from the **Select A Team Member** drop-down menu.
6. Click the **Submit** button to share the contact.

The contact is added to the partner's contact list. The partner has read access to the information in the record by clicking the contact's first name in the contact list. However, when a contact is shared with a partner outside the owner's organization and has a private note applied, the external partner cannot see the private note. A free account does not have the option to apply a private note.

For a shared contact, only the owner can edit the items shown in the Contact Information section of the contact details page, such as name and address. Only the owner can see which users the contact has been shared with or assigned to. However, either user can add or modify some information to the record, such as contact groups, general notes, or tasks. This information is generally visible to both partners, except that groups are only visible and applicable to the user who added the group to the contact.

If you want to withdraw the partner's access to the contact record, follow the same steps as above, selecting **Unshare** in step 4. When the contact is unshared, the partner will no longer see their record in their contact list or be able to view or modify the record.

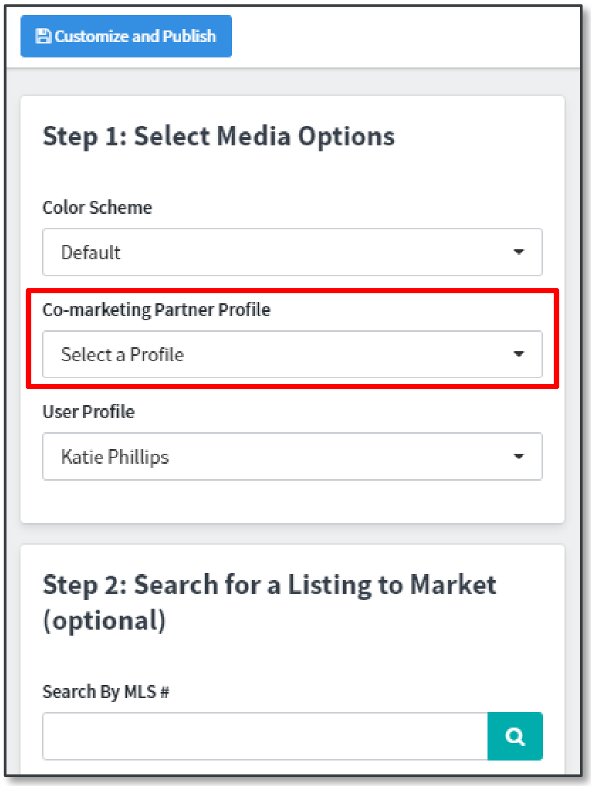
Assigning and unassigning a contact works the same way as sharing and unsharing (except that you would select either **Assign** or **Unassign** in step 4 above). The difference between assigning and sharing a contact is that the user a contact has been assigned to has access to edit the full contact record.



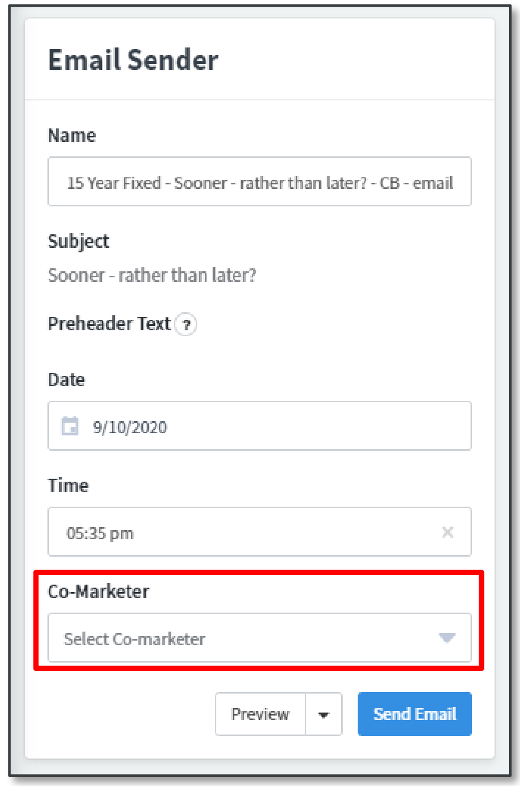
Shared Content

In general, creating co-branded content is the same as creating single-branded content for yourself. For print, email, and social media content, you will need to select a template built with placeholders for both users; these templates usually have "CB" or "Co-Branded" somewhere in the title so you can find them easily. Then during the setup of the piece, you simply have to select the name of the desired co-marketing partner from a drop-down list.

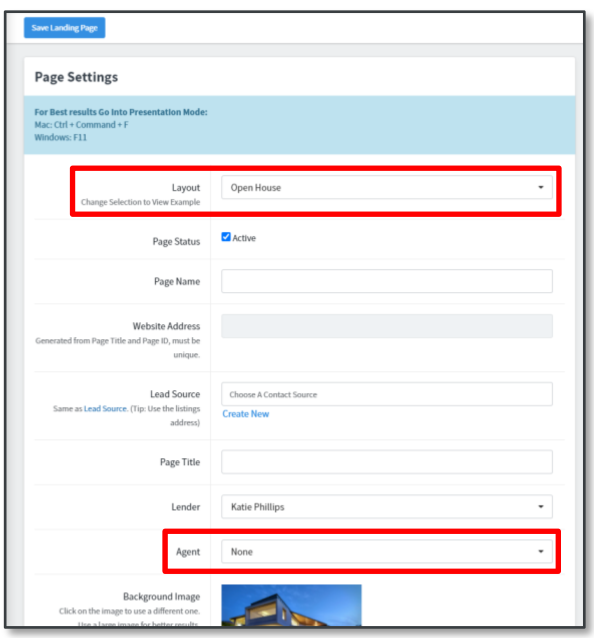
Print setup:



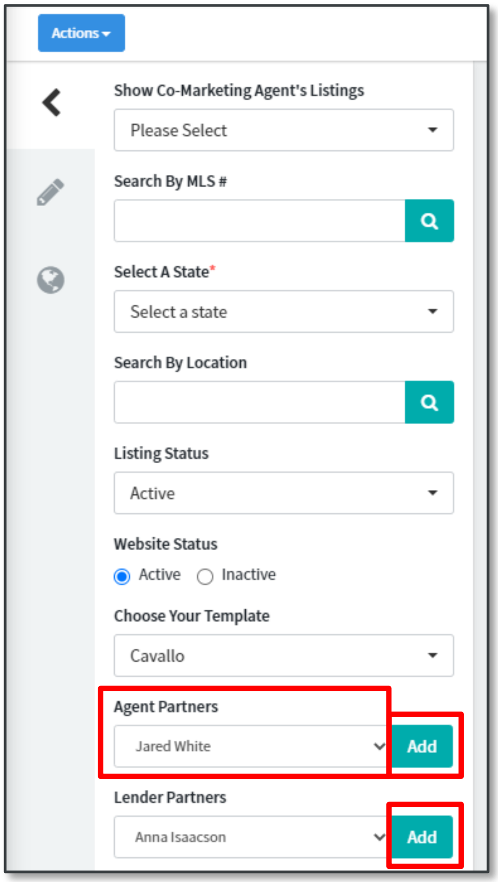
Email setup:



When building a lead capture app, select the **Open House** option and select an option from the **Agent** field.



When building a single property site, select an option from the **Agent Partners** field. Then click the **Add** button for both your and your partner's names to add the profiles to the site.



In any of these cases, the template includes placeholders that automatically retrieve the necessary information from the selected user's profile and display it in the appropriate place. If any field has been left blank in the profile, the placeholder collapses so an empty space is not shown in the final piece.

What a Free Account User Can Do

Your co-marketing partner using a free account has 5 main features available:

1. Single Property Sites
2. Lead Capture Apps
3. Print Marketing
4. Email and Drip Campaigns
5. Contact Management

Each of these features works the same way as it does in your full account, though some aspects may be limited or absent. In addition to these, there are some smaller features they can use, including limited reporting related to contact management and email, tasks, and the activity stream.

And of course, a free account user can manage their co-marketing connections.

What Is Not Included

Of course, free accounts do not have access to all the features of a full account. Some notable things not available in a free account include:

- Journeys – Free accounts have no access to create, edit, or use journeys. Journeys cannot be shared with a co-marketing partner the way a print or email template can.
    - If you are operating a journey that includes sending co-marketed email templates, you can select your preferred partner to include on those templates. The partner would have no control over this, however.
- Auto campaigns – As with journeys, free accounts have no access to auto campaigns, but your auto campaigns may include co-marketed materials.
- Focused Vew – Free accounts have no access to view or create any views.
- Loan information – Free accounts do not have visibility into any loan information, even for contacts that have been shared with them.

Note
This is not meant to be an exhaustive list of features not included in a free account.