



Lead Realtor/Builder/Other Partner

The *lead partner* type of journey in Total Expert is used to nurture a contact to see whether they would be a good co-marketing partner from your first introduction to that person until they either unsubscribe or you decide to become co-marketing partners. These journeys use a mixture of emails and tasks to help you communicate with each contact on the journey.

Available Lead Realtor/Builder/Other Journey Options

- Lead Realtor Partner
- Lead Builder Partner
- Lead Other Partner

How Do You Get These Journeys Ready?

- Define a success path (the “off ramp”).
 - The journey ends with a task with 3 different task outcomes. If they are a good fit for co-marketing, you will select the Interested in Co-Marketing outcome.
- Define group names for the journey.
 - The group Lead Realtor Partner Journey is pre-defined for the Realtor Partner journey (with similar names for the others). Feel free to adjust the names of these groups.
 - As a best practice, we recommend using groups for lead nurture journeys, because they are easy to use with triggers.
- Review the content of each email template to ensure that the messages you send out align with your organization’s messaging.
 - Preview the email templates included in each journey.
- Review the tasks that are defined throughout the journey.
 - If you would like to keep the tasks, update the task template associated with each one.
 - If you do not want to use these tasks, feel free to delete them.
- Review the user notifications.
 - If you would like to keep the user notifications, update them after the Email Link Clicked and Email Opened triggers.
 - If you do not want to use these user notifications, feel free to delete them.
- Update journey statuses to reflect what you would like to see in reporting.
 - The default journey status names follow the formula `name of the Journey + loan status`.
 - Journey statuses are used to see how many contacts have made it through each phase of the journey.
- Review timer delays.
 - The times between emails vary. Feel free to adjust these intervals as you see fit.
 - By default, each of these journeys sends 6 emails over a span of 2 months.