LET’S ELEVATE

Document Purpose and Use

This document was created to be a living breathing document that AEs can leverage as part of the Let’s Elevate Phase In. We wanted to create a place that showed real time examples of questions coming in from agents and share responses to help answer future questions faster.

You should feel empowered to share the tickets that come into your queue as it’ll help others!

Additional Resources

- SOP Documents - HERE
- National Customer Talk Track - HERE

Unique Marketing Learns:

- ***Question from Agent:*** “What is this Luxury Divison on DFW Landing Page?”
  - **Answer:** Agent must meet the thresholds listed before moving forward. Once approved, Marketing should be notified and kick-off this conversation with the agent.
  - If it’s a weird situation and AE needs to answer an AE question, along with this Marketing question, then refer to **THIS TICKET*.***
    - *The questions you need to ask for Marketing are there. CC Marketing on the ticket.*

- ***Question from Agent:*** “Is there a way download flyers from Marketing Center on to my desktop from Compass Marketing, and modify with my Canva account?”
  - **Answer:** AEM to assist. Solution provided in **THIS TICKET**

- ***Question from Agent:*** “Is there a way to boost posts to target buyers in California. Specifically xx type people?”
  - **Answer:** Provide Emma’s response from **THIS TICKET**

- ***Question from Agent:*** "I am going to use **ClearDesk** for my VA. What are the next steps?"
    - **Answer:** As soon as ClearDesk match an assistant with an Agent, we send the information to Compass and they begin working on creating their account. Typically the account creation process takes Compass 4-6 business days, so by the time the assistant begins working with the Agent, they have access to the Compass Platform.

- ***Question from Agent:*** "What can I do for expired/off-marketing listings?"
    - **Answer:**
        - **Step 1:** Send the following: "Are you open to a multi-touchpoint campaign? This would allow you to get in front of these targeted consumers multiple times and showcase valuable information in more digestible ways. We have created **THIS** great guide to help agents target these expired listings through a multi-week/touchpoint campaign. Within the guide, there are links for specific marketing pieces discussed in each topic, so all you will need to do is customize.Let us know if this resource helps answer your questions, and happy to assist further if needed!"
        - **Step 2:** If agent still has question about strategy outside of the Compass platform, loop in a Marketing team member.

- ***Question from Agent:*** "doesn't have" an Xpressdocs account, cannot login to Xpressdocs, or cannot access account from Marketing Center
    - Ticket Link - ***Answer:***
        - **Step 1:** Login and impersonate agent >> try to print a postcard via Xpressdocs in their account & confirm they *do* have an account
        - **Step 2:** Confirm to agent they do have an account
        - **Step 3:** Suggest to agent that they can login to Xpressdocs via their OneLogin extension, *or* go to compass.com/xpressdocs in their Compass Chrome profile *or* open up an 'Xpressdocs compatible' postcard from Marketing Center, and select the "Print with Xpressdocs" option. This will shoot them into Xpressdocs account and, and they can navigate to Business Cards from there

- ***Question from Agent:*** An agent does not need a new logo, they just need a "name treatment."
    - Ticket Link - ***Answer:***
        - **Step 1:** Name Treatment = just wants to add their name to their logo
        - **Step 2:** Loop in Marketing team and let them know details
        - **Step 3:** Marketing Team to work on a logo / name lock-up for agent. Marketing Team should let agent know to keep an eye out for a mock-up in the next day or so.

- ***Question from Agent:*** "I have a new listing I have coming tomorrow. It will be likely priced in the 800's. I'd like to know what to do to maximize exposure since this will definitely be one that could get some great press."
  - **Ticket Link - Answer:**
    - **Step 1:** AEM to reach out to MA team & share ticket to confirm with MA team that agent is not a top-tier that needs a full listing strategy
    - **Step 2:** *AEM response:* "I recommend checking out our Listing Playbook for some initial thought starters on what marketing tactics would work best for your listing. Please make sure to also look at the No-Cost Tactics page as well! Our PR team can try to get some earned media for your listing. They'll just need high-resolution photos of the listing as well as the photographer's name. I will connect you with a Marketing Advisor to discuss this more in detail!"
    - **Step 4:** Put MA as a follower on the ticket, and once confirmed the above response is correct with MA, send response in Zendesk.

- ***Question from Agent:*** "How do I advertise my listing in X publication? What digital advertising options are available?"
  - **Ticket Link - Answer:**
    - **Step 1:** AEM to reach out to MA, sharing the ticket and confirming what options are available
    - **Step 2:** AEM should try to direct the agent to the platform if it makes sense. In this case, it does because the agent inquired about digital options, aka paid social via Digital Ads Tool. Example Response:

      "Here are some digital advertising options we have:
      (1) *standard listing ad(s) via the Compass Digital Ads Tool targeted to specified zip codes (can include out-of-state zip codes)*
      (2) *the WSJ/Mansion Global option via the Compass Digital Ads Tool (there may be listing eligibility requirements)*
      (3) *display banner campaign across the wider web to promote the listing"*

      DFW has a number of vetted, local media partners with whom we've negotiated rates. That said, agents do sometimes inquire about national publications outside of DFW, such as NY Times. In this case, the agent asked about NY Times and LA Times. Example response:

      "As for X publication, there are likely some advertising opportunities available, but these would take a little bit more time to source. Our Marketing team would need to connect with the local teams in X region to gather all the necessary details. So, if you're interested in more than the digital opportunities I shared above, I would be happy to loop in the Marketing team to continue down this path with you."

                ■ **Step 3:** Put specific MA as a follower on the ticket so they can step in with additional context if the agent continues to express interest in the off-platform offerings.
- ADD GIANNA EXAMPLE
    - Ticket HERE

- ***Question from Agent:*** "How do I order Name Tags?"
    - **2020 Ticket Link & 2021 Ticket Link - Answer:**
        - **Step 1:** FastSigns does them (copied the Name Tag specifics below)
            - Name Badge
            - FastSigns: Alexis Lira ; alexis.lira@fastsigns.com ; 214-526-7446
            - Their standard name tag is 3"x2" if you would like it printed in color they are $15 each. If you would like it to be engraved (only one color) they are $18 each. They do have a minimum of $55.
                - Attached are two visuals of the printed vs engraved. These are not the standard size but wanted to give you some ideas.
                - I've also attached our Compass logo to use for this
            - ***(Attachments are in the linked tickets above)***

Question from Agent: Trifolds "Submit for Approval" Can someone go in and get this approved and on its way?

Answer: Yes, it will need to be approved by an internal Compass employee before the order is actually sent to Xpressdocs to print. It should take 30 minutes at most for this step.

- To confirm approval and get it sent to Xpressdocs, you will need to call Xpressdocs support at 866.977.3627 to confirm that the order has been placed for the agent.
- Example Ticket HERE and HERE

Frequently Asked DFW Agent Questions & AE Responses:

- ***Question from Agent:*** "How do I access my Marketing Budget?"
    - **Answer:**
        - **Step 1:** *Copy and paste the following:*

"Hi xx!
To see your remaining marketing budget and submitted expenses, you will need to log in to Business Center. Here are some helpful items about logging into Business Center:

- Log-in Page HERE (I'd recommend bookmarking this page so it's easy to find!)
- How-To Videos HERE
- FAQ HERE

What if I don't know my login info? All team leads should have received an email from Finance with their login info. If you cannot find this email, or believe that you have not received this email, please reach out to closings@compass.com."

- ***Question from Agent:*** "How do I go about ordering a large custom sign and who do I go to for designing the creative for it?"
  - **Ticket Link - Answer:**
    - **Step 1:** AEM to reach out to MA Slack Channel, to find agent's assigned MA
    - **Step 2:** Attach THIS DOC *& AEM to respond & loop in Marketing on the email:*
    - "We recommend vendors such as Diesel Displays or FastSigns. I have attached a helpful sheet that will guide you through this process.
      I have also looped in our Marketing Team on this email, so you can reply here with sign dimesons, etc."
      "All we need from you is the following information so we can get started:
      - Copy/contact information you want to include on the sign
      - Signage specs
      - Deadline - when you will need the final design by
      - Any print bleed that the sign company will need
      - Design direction - black vs white background, which photos to include, anything else that will help with the design"

Coming Soon! Logo Gallery: Employee-Facing Only	**ALL**	In an effort to streamline logo offerings – the Agent Logo Gallery will be shifted from an **agent-facing view to <u>employee-facing view only</u>**. This shift will likely take place within the next ~2 weeks and you will be notified as soon as it is complete. Note: Please pause on sending agents to the Logo Gallery as we will have a new logo intake process rolling out soon. Temporarily (until the new process rolls out in your region), if an agent asks about a logo an AE/MA can sit down with the agent to view logo options available for them in the gallery.

Question from Agent: Does the full team name need to be in the agent's logo?

Answer: Yes.

- For example - WWG = the monogram of their official name which should be "Walsh Wegman Giordano **Team"** which would be spelled out underneath.
- "Team" or "Group" is required in the name per TREC. Therefore, it must be included in the logo as well

Question from Agent: “I want to build a website, but do yall have any preferred vendors you can provide and more info?”

- **Answer.** Copy and Paste the linked info HERE & loop in an MA to execute