



POWER USER PLAYBOOK

MMI + BONZO AGENT STRATEGIES

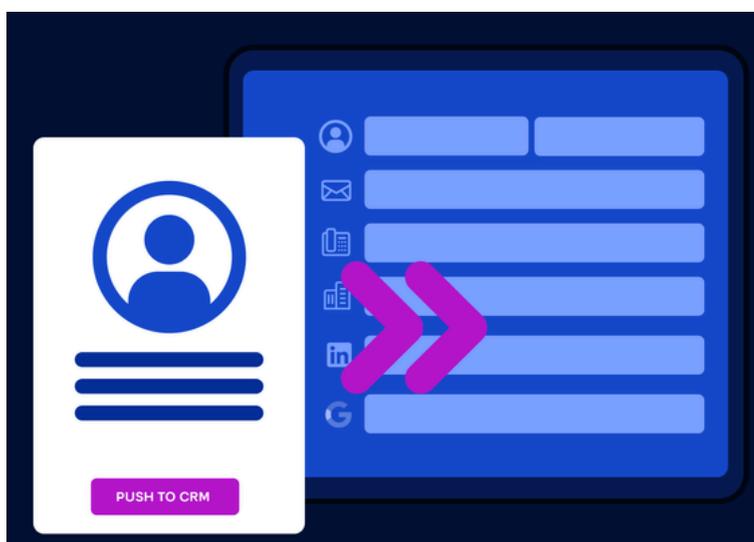
UNLOCK THE POWER OF DATA AND AUTOMATION



MMI + BONZO JOINT STRATEGIES

This playbook outlines tactics proven to assist in building and growing agent relationships. It shows you how to access and leverage data from MMI, and then activate it using Bonzo tools for your marketing and outreach efforts.

Before using the systems in tandem, it's crucial to set up the MMI Enhanced Webhook in Bonzo so that you can transfer MMI data to Bonzo with the click of a button.



Thousands of LOs trust MMI's data to help them find more agent partners. Thousands more trust Bonzo to send out compliant and timely SMS and email marketing to agents, prospects, and borrowers.

With the two platforms combined, you'll have the tools to succeed in any market.

Simply request a demo to see the two systems in action.

MORTGAGE DATA

About MMI

MMI is a leader in data intelligence and market insights for the mortgage and real estate industries, offering actionable intelligence for lenders, agents, brokerages, and title companies.

MARKETING AUTOMATION

About Bonzo

Bonzo streamlines customer engagement for mortgage professionals by automating tasks and enabling efficient client communication via video, voice, and text — all within a single platform.

Mortgage data + marketing automation

MMI and Bonzo users have access to:

- Agent transaction history
- Agent tracking & alerts
- Adding MMI agents to your Bonzo CRM
- Marketing campaign automation
- SMS & email marketing platform
- And many more tools designed to help you close more deals

Identifying & Contacting/Connecting with Buyside-Listside Agents

Realtors want to trust their LO partners, value open communication, and appreciate timely updates. They want to feel like they're part of a cohesive team. Take your first step toward reconnecting and building that trust.

What is it?

A snapshot of the realtors an LO has worked with in the past 12 months is auto-tracked by MMI using your NMLS ID. After identifying your realtors in MMI, you can categorize them in Bonzo using tags and custom lists and set up automated quick replies for immediate outreach based on "Same Day Listing" notifications.

RESOURCES

- ▶ [My Buyside & Listside Agents](#)
- ▶ [Bonzo Power Features: Importing, Organization, & Quick Replies](#)
- ▶ [People: Formatting, Custom Fields, Importing](#)
- ▶ [Setting Up Your MMI Enhanced Webhook](#)
- ▶ [Quick Replies & Content Library](#)
- ▶ [Power User Playbook - Building Agent Relationships](#)

QUICK ACTION STEPS

1

Review any emails sent by MMI showing recent activity.

2

Create a folder to hold all email alerts in regards to your agents - perhaps even have subfolders to help organize opportunities.

3

Time to call and congratulate! Get the conversation started using our **call scripts** (found in the [Power User Playbook](#) linked above) as a starting off point.

4

Rinse & repeat - Every alert is an opportunity!

Where do I find it?

In MMI, go to the **Real Estate** tab on the dashboard and select RE Agent Tracking.

 [How to Find My Buyside & Listside Agents](#)

In Bonzo, for large lists of existing realtors, export the realtor list from MMI to your downloads, toggle over to Bonzo, and utilize Bonzo's import feature found under the **Data** tab.

 [Bonzo Power Features: Importing, Organization, & Quick Replies](#)

In Bonzo, for single imports, utilize the MMI-enhanced webhook to export realtors into Bonzo at the click of a button.

 [Set Up Instructions](#)

How should I take action?

In your dedicated Bonzo **Content Library**, create **Quick Reply** templates for immediate use. This will save you time crafting messages from scratch. When you receive your "Same Day Listing" notification, your outreach is ready to go.

 [Quick Replies & Content Library](#)

When should I take action?

Daily! MMI sends a daily email with active listings from previous agents, allowing you to act immediately. Aim to push 10-15 new realtors from MMI to Bonzo each week, then use **Quick Replies** to connect instantly.

Property Monitor and Building Joint Landing Pages & Campaigns

Property Monitor alerts you instantly when properties you've worked on hit the market, enabling timely outreach to borrowers for assistance. It's also an ideal moment to get introduced to their agent and offer Joint Landing Pages and Campaigns for immediate value delivery.

What is it?

MMI monitors past property addresses listed for sale and sends instant email alerts. In Bonzo, impress new realtor partners with customizable joint landing pages to capture prospect data and route them to personalized automated outreach campaigns.

Where do I find it?

In MMI, go to the **Other** tab and then select **Property Monitor**.

[How to Set Up Property Monitor](#)

In Bonzo, click the **Landing Pages** icon to begin. Upload co-branded content, link **Campaigns**, and set up automatic tagging so that you and your realtor partner can track your prospects.

[Joint Landing Pages & Campaigns](#)

How should I take action?

In MMI, click **NMLS Watch** to see automatic updates. Verify active listings by clicking on property details. In Bonzo, access **Landing Pages** easily from the sidebar. Set up campaigns by navigating to **Campaigns**, where you can start from scratch or use pre-built templates.

When should I take action?

Daily! MMI will send you daily email alerts for active listings. Act quickly on these alerts and contact the borrower. Create Landing Pages and Campaigns beforehand to save time later. This upfront effort will streamline tracking, organizing, and converting leads.

RESOURCES

- ▶ [Property Monitor](#)
- ▶ [Joint Landing Pages & Campaigns](#)
- ▶ [Creating Landing Pages](#)
- ▶ [Managing Campaigns](#)

QUICK ACTION STEPS

1

Make sure your NMLS ID is connected to MMI.

2

The system will now monitor all past addresses you have had a deal on and update you on any new active listings. MMI will send a daily email alert — act on these immediately.

3

Time to call that old borrower and check in. Even if they've moved, you can add their current address to be monitored for future activity.

4

Ask for a warm intro to that borrower's agent, and then offer the agent the ability to leverage your Landing Pages and Campaigns in their marketing efforts.

5

Rinse & repeat - Every alert is an opportunity!

LO Agent Wallet Share & Connecting with New Agents

Do you know how strong your relationships are with your agent partners? Are you maximizing their business share and all loan opportunities? Are your communications effective?

What is it?

MMI's **Wallet Share** shows which agents you work with and your percentage of their business. Improve this by using **Bonzo Broadcasts** for Friday reminders, newsletters, and product offerings to showcase your expertise. This will help move agents from your C list to your A list in your **Realtor Portal**.

Where do I find it?

In MMI, under **Other Tab - LO Agent Wallet Share**.

 [How to Find LO Wallet Share](#)

In Bonzo, the **Data** dropdown houses the **People** tab for creating and sending broadcast messages, and the **Realtor** portal for contacts marked as realtors in your account.

 [People: Quick Action Toolbar](#)

 [People: Realtor Portal](#)

How should I take action?

In MMI, verify whether or not you're getting the agent's business as claimed. Compare lender matches to see relationships at a glance.

In Bonzo, go to the **People** tab, select your custom list of realtors (A, B, or C list), and use the quick action toolbar to send a broadcast message. View current and past deals and prospects in the **Realtor** portal.

When should I take action?

Act now to protect your agent wallet share. Use MMI to understand the numbers and have informed conversations with agents about adding more value to their business.

In Bonzo, segment your agents and send personalized broadcasts, messages and newsletters. This demonstrates your expertise and attention to detail.

RESOURCES

- ▶ [Wallet Share](#)
- ▶ [Realtor Portal & Broadcasts](#)
- ▶ [People: Quick Action Toolbar](#)
- ▶ [Broadcasts: Tips & Best Practices](#)
- ▶ [People: Realtor Portal](#)

QUICK ACTION STEPS

1

Review the data. Compare the total number of transactions and volume to that of what you have shared with the agent.

2

Next, dive deeper into the Fast Facts profile to validate further information. Determine if there is a preferred relationship already or if there is an opportunity for you to secure this role.

3

Now is the time to call and have a conversation or contact them through Bonzo and use broadcast messages. Have the information available to show or send, and then emphasize where you can help the agent grow their business.

4

Rinse & repeat - Every alert is an opportunity!

Matchmaker, Pipelines & Routing Groups

Quickly discover local agents in MMI who match your transaction history – in the same area and often on the same street. Set up Bonzo Pipelines with automated messages and custom routing to align your sales process with outreach efforts.

What is it?

Organize your sales process and include high-performing agents using MMI data. Match with local agents who have done similar transactions in the past year. Bonzo's Pipelines combine function with strategy, allowing you to tailor the platform to your business needs and use cases.

Where do I find it?

In MMI, under Other Tab - Matchmaker.

[How to Use Matchmaker](#)

In Bonzo, **Pipelines** is an add-on product that, once activated, features prominently on your sidebar navigation. Also in Bonzo, **Campaigns** act as the communication journey for a prospect,

[Pipelines & Routing](#)

How should I take action?

In MMI, click the **Matchmaker** tab to see a map with three nearby agents and links to their **Fast Fact Profiles**. In Bonzo, allocate time to build **Pipelines, Routing Groups,** and **Conditions**. This upfront effort allows you to easily import realtors from MMI and automate your outreach.

When should I take action?

Set aside time weekly to identify nearby potential agents and build a Pipeline tailored to your business. This will streamline your outreach, allowing you to focus on responding to realtors interested in booking appointments.

RESOURCES

- ▶ [Matchmaker](#)
- ▶ [Pipelines & Routing](#)
- ▶ [Editing Your Pipelines](#)
- ▶ [Webhook Routing](#)
- ▶ [Bonzo Realtor Playbook](#)
- ▶ [Power User Playbook - Building Agent Relationships](#)

QUICK ACTION STEPS

1

First, make sure your NMLS ID is connected to MMI.

2

Next, open **Matchmaker** and review the list of the first three agents via their **Fast Fact profile**. Check the addresses shown in comparison to your own past deals.

3

Time to make a call or begin digital outreach using Bonzo! Start a conversation using the **MMI Call Scripts** (found in the [Power User Playbook - Building Agent Relationships](#)) or **Pipelines** messaging in Bonzo on how you both seem to cover the same area so why haven't you partnered up yet?

4

Rinse & repeat - Every time you log in to **Matchmaker** you'll get three new agents to choose from.

Prepared by



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Kortney Lane-Schafers is passionate about helping people and businesses reach their full potential. In her role at MMI, she leverages her seasoned expertise in account management and client success to strategize with customers, driving adoption and maximizing ROI.



Dan Lawrence

Member Trainer Coordinator

As Member Trainer at Bonzo, Dan leads initiatives to provide members with top-tier resources for continuous learning and business growth. His role includes creating training materials, technical documentation, and strategy videos while collaborating with teams to meet member needs.

MMI Data Drills Bi-Weekly Webinar

Take your MMI skills to the next level.

Register now

MMI + Bonzo Power Duo Series

Learn strategies for maximizing MMI data and optimizing your CRM to earn more business.

Register now