

PREPARING YOUR AGENCY PORTAL

☐ Request your Agency Portal

If you are working with the Edvisor Distribute Expert Plan, you can request your Agency Portal through the link

<https://www.edvisor.io/distribute/agency-portal>

☐ Create your Agency Portal URL

Once we've activated this option for your account, you'll see a new 'Agency Portal' button in the agency section of your Edvisor Distribute dashboard.

 [Tutorial](#)

☐ Access Your Agency Portal and Invite Your Entire Team

- Access Your Agency Portal

- Invite Your Team

 [Tutorial](#)

☐ Enable payments

To enable payments on your Agency Portal, [please submit your request through this form](#).


☐ Ensure your pricing is up-to-date on Edvisor

- Through  [edcover](#), let us do it for you!

 [Tutorial](#)

☐ Enhance Your Edvisor Profile

Your profile includes detailed views of your campuses and the variety of programs you offer, it's essential to ensure your presentation is both engaging and authentic.

 [Tutorial](#)

☐ Get ready to receive your applications through Edvisor

 [Tutorial](#)

LAUNCH YOUR AGENCY PORTAL

☐ Test the portal internally

Before the world gets to see your new Agency Portal, your team needs to know it inside and out.

- Onboard your whole team

- Explore all the features

- [Schedule a Training Session with your Edvisor Account Manager](#).

☐ Add it to your website

Your website is the frontline of your B2C engagement.

 [Tutorial](#)

- Update all agency resources

- Create a special section on page of your website dedicated to your agents

- Add your Agency Portal to your footer

- Add pop-up notification for your agents

- Include a question related to the Agency Portal to your FAQ section

☐ Start training your agents

You can train your agents with:

- Live demos

- Hands-On Practice during all your calls, when they reach out via email or WhatsApp

- Offer continuous support, ensuring questions are answered

- [We've created a comprehensive tutorial on how to use the Agency Portal, step by step.](#)

☐ The Big Launch

Here's our handpicked list of key marketing actions essential for a successful launch:

- Email Campaign

- Launch Webinar

- Social Media Buzz

- Exclusive Offers

- Personal Email Sequences



Agency Portal

Guide for Educators

SCALE YOUR AGENCY PORTAL

☐ Adopt post-launch key practices

The success of your Agency Portal hinges not just on its functionality but also on your commitment to its active management and promotion. To truly harness the full potential of the portal, consider adopting the following post-launch key practices:

- Continuous Profile Updates

- Monitor and Manage your Connected Agencies

- Persistent Promotion and Communication

- Regular Trainings

- Include a link to your Agency Portal in your email signature

- Showcase your Agency Portal in Workshops