

A top-down view of a desk with a laptop, a pen, glasses, a smartphone, and a succulent. The laptop is white with a black keyboard. A hand with a silver ring is typing on the keyboard. A black pen with yellow accents lies on the desk. A pair of black-rimmed glasses is on a black mousepad. A smartphone with a white marble case is also visible. A green succulent is in a white pot on the mousepad. There are teal and white decorative blocks on the page.

CONNECTIVE: A MONTH IN DIGITAL

THE ULTIMATE GUIDE
FOR MORTGAGE BROKERS

A man with a beard, wearing a brown jacket, is looking down at a tablet computer. The background is a blurred office setting with warm lighting. A teal-colored rectangular overlay covers the right side of the image, containing text and social media icons.

INTRODUCTION

Want to amplify your influence as a mortgage broker? Enhance your capacity to write more loans? The secret to success is an effective digital marketing strategy that helps you add value and position yourself as the 'go to' broker in your community.

A Month in Digital – The Ultimate Guide for Mortgage Brokers provides you with an easy, practical way to market effectively in the digital space. It gives you an easy-to-follow four week guide to implementing a sustainable digital marketing plan that can help you to future-proof your business.

So let's get started! Simply follow this simple guide and you'll soon see your prospect list grow, your referrals and leads increase, and your income flourish!

Don't forget to share your progress with us on social media.



PREPARE TO SUCCEED IN THE DIGITAL MARKETING SPACE!

On the following pages, you'll find a Monthly and Weekly Activity Overview that will guide you through the process of creating a sustainable digital marketing plan. But first you need to pay some attention to how you will present your brand identity and build recognition with your audience. Preparing these professional components beforehand will make a big difference to the impact of your digital marketing efforts.

A LOGO

It should be simple and effective. We recommend consulting a graphic designer and obtaining versions in .jpg and .png.

A FONT AND COLOUR PALETTE

It is important to be consistent with fonts and colours across all of your digital media platforms to build your brand. Again, talk with your graphic designer and make sure they work with your logo.

PROFESSIONAL PHOTOGRAPHY

Invest in a suite of high quality images of you and your team and keep it updated. The digital space is a very visual media and unprofessional photography could damage your image.

DOWNLOAD AN IMAGE CREATION TOOL

Facebook is a visual platform, so you'll need to start creating branded artwork for your posts. Programs like Canva or PicMonkey are easy to use and will help you to combine your logos, fonts and photography into images which will differentiate you from the crowd.

A WEBSITE

If you don't have one yet, talk to your Connective Broker Support Manager to organise a cost-effective My Marketing Website that supports your brand identity. If you have a website already, audit it to ensure it reflects your brand identity and includes the elements mentioned above. All your branding elements must work together in a professional way across all your digital sites.

FACEBOOK, LINKEDIN AND TWITTER ACCOUNTS

These are the three basic platforms that you should use, however Instagram may also work for you if you have a large Gen Y audience. Ensure you have a Facebook Business page and a LinkedIn Company page. Use your branding elements when you set up your social media accounts to help build your brand and ensure your business presents a professional, coherent image.

A NEWSLETTER

If you're not already producing a monthly newsletter, talk to your Broker Support Manager about a cost-effective My Marketing Subscription. This will give you a professionally prepared newsletter with articles designed to appeal to your specific audiences. You can also sign up for Connective Socialise which will save you time by posting relevant articles on your Facebook, LinkedIn and Twitter accounts.

A BLOG

This is where you showcase your personal expertise to raise your profile with your audiences. You should write at least two blog articles a month, so you can include them on your website and post links to them on your social media pages. (For tips about writing your blog, see the tips and tricks section at the end of this guide).

HOW TO USE A MONTH IN DIGITAL

What's the difference between mortgage brokers who have a successful digital identity and those who don't? Planning.

This guide will show you how to create a plan that sets you apart from your competitors and connects you with an audience that's ready to engage your services. It will also help you rationalise your digital marketing activities and build a solid strategy for creating, enhancing and updating your digital assets.

To be successful, you will need to set aside time in your calendar to perform the necessary activities. This is critical – you need to plan ahead in order to use your precious time to the best effect!

AT THE START OF THE MONTH:

- Look to the Monthly Overview section of this guide.
- Plan a brainstorming session to identify key themes you want to communicate and outcomes/business objectives you want to achieve in the month ahead. Think about your various audiences – what content can you create that will be relevant and valuable? What will they find interesting and entertaining?
- Use the calendar to plan out the key themes for your content across the month to come. Decide who is going to write which articles and social media posts, assign tasks and set deadlines. If you're going to do them yourself, reserve time in your daily planner or calendar.
- Also use the calendar to plan out anything else you need to accomplish this month – updating your website content, creating some videos, taking photographs of happy customers for social media posts, supporting a local charity, perhaps you could interview a local person of interest for your blog.
- Identify key areas of focus for your business. What are your goals? Create rough notes outlining your key activities and what you'd like to achieve each week.

AT THE START OF EACH WEEK:

- Look to the Weekly Overview section of this guide.
- Identify the key activities you have roughly outlined for this week. If there are too many, choose activities that will serve your business best and reschedule the others.
- Have a short content brainstorming session. Finalise the content and social media posts you have identified at the beginning of the month for that week.
- What else has occurred in your mortgage broking business recently? Include any important news, recent successes and so on. Think about what your audience really wants or needs to know.

WEEK ONE



Audit and update your website, ensuring it carries your logo, font colours and professional photography.



Create a Facebook Business page.



Invite your network to 'like' your new Facebook Business page.



Add social media icons to email footers and other marketing collateral.



Create at least three pieces of content (at least one article and two shorter social media posts – these should be in addition to any Connective Socialise posts you receive, in order to personalise your social media sites to your business).



Post at least twice on Facebook.



Post at least twice on LinkedIn.



Post at least twice on Twitter.



Tag people you mention in your Facebook posts.

WEEK ONE:

MONDAY:

- Monthly Content Brainstorming Session (include your team). 50% of your content should be self-promotional and 50% related to your business.
- Assign tasks and get this week's content and posts underway.
- You'll need at least three pieces of content – they can be articles or perhaps videos, or shorter posts which include visuals.
- Audit or refresh your company website.
- Schedule time in your diary to achieve this week's digital strategy outcomes.

TUESDAY:

- Create a Facebook Business page.
- Invite your network to 'like' your Facebook Business page.
- Claim your brand 'handles' across LinkedIn and Twitter.
- Make a short post on Facebook, LinkedIn and Twitter. Early in the morning or late afternoon are great times to post.
- Invite your clients and friends to follow you on all platforms.

WEDNESDAY:

- Finalise your first content article and put it up on your website.
- Share it on your Facebook Business page.

THURSDAY:

- Make posts on Facebook, LinkedIn and Twitter.
- Experiment with boosting your Facebook posts. To find out how, click the 'boost' button to the bottom right of images or articles you've shared on your Facebook Business page. You'll need to pay for this, so start with a small budget.

FRIDAY:

- Ensure all your marketing collateral/email signatures now carry your social media icons.
- Post a link to your content article on Facebook, LinkedIn and Twitter.
- Tag people and businesses you mention in your Facebook posts by tagging them. Just place the @ symbol in your Facebook text box and slowly type their name, then click on the dropdown box.

WEEK TWO:



Create a LinkedIn Company page.



Write a blog and share it as a LinkedIn article.



Put your blog article up on your website.



Create at least three pieces of content (at least one article/blog post and two shorter social media posts).



Investigate Remarketing, SEO and Google AdWords.



Post at least twice on Facebook.



Post at least twice on LinkedIn.



Post at least twice on Twitter.

WEEK TWO:

MONDAY:

- Short Content Brainstorming Session.
- Assign tasks and/or get this week's content/posts underway.
- Block out time needed in your diary to achieve this week's digital strategy outcomes.
- Create a LinkedIn Company page.

TUESDAY:

- Create two social media posts.
- Share the first one on Facebook Business, LinkedIn Company and Twitter.

WEDNESDAY:

- Write your first blog article.
- Share it as a LinkedIn article.
- Post it on your website.

THURSDAY:

- Share your second social media post on Facebook Business, LinkedIn Company and Twitter.

FRIDAY:

- Investigate Remarketing, SEO and Google AdWords.
Remarketing is where you have advertisements for your business follow visitors to your website whenever they go online. SEO stands for 'search engine optimisation' – using specific words and phrases on your website to assist in organic searches for your business type. Google AdWords allows you to buy words and search terms frequently used by your customers to send them directly to your website. You may like to consider hiring a company to help you with these activities if you don't have time to do it yourself.

WEEK THREE:



Create your first newsletter and send it to your database of clients.



Register on Google My Business and populate your listing with images, opening hours and posts such as testimonials from happy customers.



Create at least three pieces of content (or use your newsletter articles).



Post at least twice on Facebook.



Post at least twice on LinkedIn.



Post at least twice on Twitter.

WEEK THREE:

MONDAY:

- Short Content Brainstorming Session.
- Assign tasks and get this week's content/posts or newsletter underway.
- Block out time needed in your diary to achieve this week's digital strategy outcomes.
- Create at least two short social media posts with visuals – consider using a professional photograph with a link to your newsletter articles. If you don't have a suitable photograph, purchase one from a professional photo stock house.

TUESDAY:

- Post your newsletter articles on your website.
- Share your first short social media post on Facebook Business, LinkedIn and Twitter. If using your newsletter articles as posts, link them back to your website.

WEDNESDAY:

- Send out your newsletter to your database via email. Use Mercury to make it simple.

THURSDAY:

- Share your second social media post on Facebook Business and LinkedIn.

FRIDAY:

- Register on Google My Business and complete your profile.
- Share another piece of content on Facebook Business, LinkedIn and Twitter.

WEEK FOUR:



Write a blog and share it as a LinkedIn article.



Post your blog on your website.



Explore the use of hashtags with your Twitter account.



Create at least three pieces of content – one content article and two shorter social media posts (you can count your blog as the content article).



Post at least twice on Facebook.



Post at least twice on LinkedIn.



Post at least twice on Twitter.



Review your digital progress and boost posts which have worked well.

WEEK FOUR:

MONDAY:

- Short content Brainstorming Session.
- Block out time needed in your diary to achieve this week's digital strategy outcomes.
- Explore the use of hashtags with your Twitter account.

TUESDAY:

- Create two short social media posts.
- Share the first of these on Facebook Business, LinkedIn, and Twitter.

WEDNESDAY:

- Write your second blog for the month
- Share it as a LinkedIn article.
- Post it on your website.
- Post links to it on your Facebook Business, LinkedIn Company and Twitter pages.

THURSDAY:

- Share your second post on Facebook Business, LinkedIn and Twitter.
- Checkout the basic insights tools included with Facebook, LinkedIn and Twitter to see which posts did best. Boost or promote any that have worked well.

FRIDAY:

- Review your progress for the month across your website and blog, social media suite and Google AdWords or paid advertising.
- Use Google Analytics on your website to track where new and returning web traffic is coming from. Plan to invest your time in the areas of greatest return.

TIPS AND TRICKS

One of the most powerful tools in a mortgage broker's digital arsenal is your blog. It not only makes your corporate website more organically relevant to Google – it creates a point of difference setting you apart from the majority of brokers who neglect to make their opinions known.

First, create a blog page on your website, or have your friendly website developer update your website and teach you how to easily post blog content on it. (If you subscribe to a Connective My Marketing Website, the team will be happy to help – simply email them at mymarketing@connective.com.au for instructions).

The million-dollar question:

What should you blog about? As with your social media content, a balanced mix of content is ideal. If you write a blog about the latest RBA announcement, make your next blog a post about 'Top 5 Finance Apps', or 'The Best Reasons to Buy Bayside (or wherever your business is based).

Also consider interviewing clients about their experience, or creating highlight blogs featuring referral partners' services. Delve into your own interests, too. Share your favourite operas with your audience! Explain why being a Collingwood fan makes you such a great mortgage broker. The key to blog content is mixing it up, and not writing solely about your category.

LinkedIn allow their members to 'write an article', which is an incredibly powerful tool. Similar to a blog, LinkedIn articles ensure that your audience are alerted every time you post an article! We recommend posting blog content on your website, and then repurposing it as a LinkedIn article. Publish 75% of your blog as a LinkedIn article, and offer a link at the end of the post directing the audience to your website to complete their read. Just like that, you're looking at additional website traffic!

Make sure to hyperlink any references to other articles you write, and use your blog to TAG subjects you're writing about i.e. finance, broking, refinance, mortgage, loan, car finance, football, opera, property investment.

Be sure never to infringe copyright. Others' work is not yours to copy and paste – whether it's in written form or an image.

TIPS AND TRICKS

REMARKETING, SEO AND GOOGLE ADWORDS

Organic content – creative social media and blogging – are part of the digital puzzle. Good quality content sets you apart as a mortgage broker, enhancing your capacity for referrals and positioning you as a leader. The other part of this puzzle are the things which ensure the hard work you've done developing your content pays off by reaching the right audiences. These include Remarketing, SEO and **Google AdWords** and marketing direct to your clients on Facebook.

Confused? Don't worry – you might need to engage a professional to help you with this 'synthetic' aspect of your marketing. Find out more by clicking the following links.

[Google AdWords](#) and [SEO](#) (that stands for Search Engine Optimisation – the practice of using common search words in your website copy) are at the core of 'cold' business for mortgage brokers. If you don't have time to do this yourself, work with a talented digital partner to create powerful SEO within your website, and Google AdWords that deliver you fresh prospects.

Remarketing is a great way to remind potential clients about your business. Once they visit your website, you can elect to have adverts for your mortgage brokerage follow them around the internet for a given period. Powerful stuff!

LINKEDIN FOCUS

LinkedIn will most likely be the social media platform you'll get the greatest sense of 'winning' from when it comes to your influence as a mortgage broker. Unlike Facebook's complex algorithms, LinkedIn currently displays your content to the lion's share of your connections – without asking you to pay for it. Sharing intelligent social media messaging on LinkedIn is very rewarding, as most users of this platform do not offer bespoke content.

Ensure you've registered your LinkedIn Company page, and populated it with artwork and up-to-date information about your business. Follow clients and companies you feel a sense of connection to.

Share the same content you delivered on your Facebook Business page with your LinkedIn audiences. You can 'tag' businesses and individuals in your LinkedIn posts in a similar way.

Have a post you think is suitable for Facebook but not quite the match for LinkedIn? Go with your instincts - lifestyle content about BBQs in your local park might not be that relevant to your LinkedIn followers.

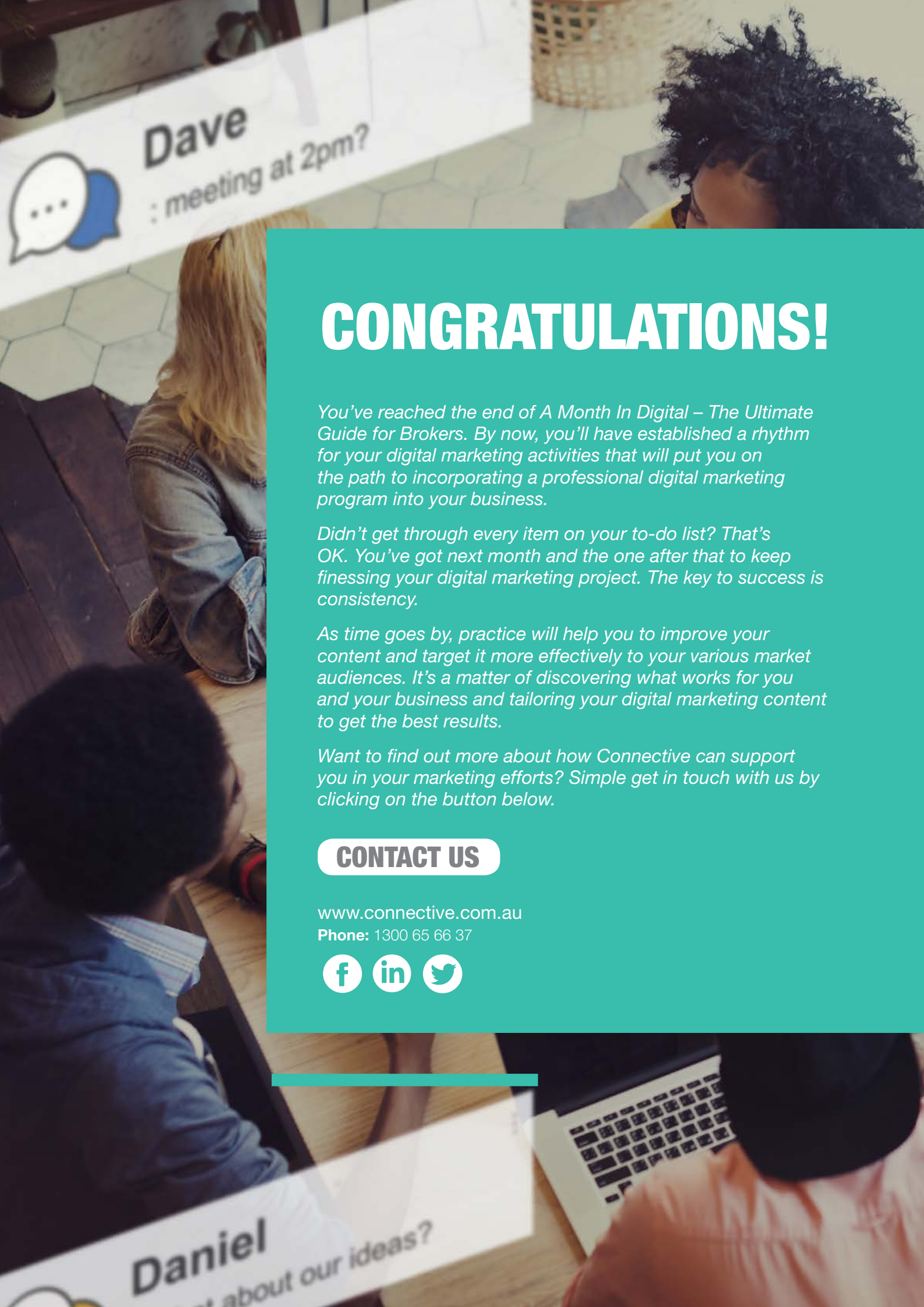
TIPS AND TRICKS

LEVERAGING FACEBOOK

In order for your audience to view your content, you must pay to 'boost' your posts. You'll find the 'boost' button to the bottom right of images or articles you've shared on your Facebook Business page. Click on the 'Boost' button, choose your audience, budget and length of promotion. Change up your audience occasionally – as content focused on first home buyers is likely to be different to content focused on downsizing retirees.

Want to enhance your brand's number of Facebook followers? Also known as your 'vanity' number, it's critical to 'Promote' your Facebook Business page to have your number of Facebook followers grow. You'll find the 'Promote' button in the left-hand column of your Facebook Business page. The process of identifying your promotion audience is almost identical to 'boosting' your Facebook posts. Word to the wise – don't expect your numbers to grow astronomically overnight. Your vanity number does not impact upon your capacity to push content to the right audience.

Experiment with budgets for boosting and promotion – start off with a budget of \$10 – \$20 per Facebook post boost and \$30 per page promotion.



CONGRATULATIONS!

You've reached the end of A Month In Digital – The Ultimate Guide for Brokers. By now, you'll have established a rhythm for your digital marketing activities that will put you on the path to incorporating a professional digital marketing program into your business.

Didn't get through every item on your to-do list? That's OK. You've got next month and the one after that to keep finessing your digital marketing project. The key to success is consistency.

As time goes by, practice will help you to improve your content and target it more effectively to your various market audiences. It's a matter of discovering what works for you and your business and tailoring your digital marketing content to get the best results.

Want to find out more about how Connective can support you in your marketing efforts? Simple get in touch with us by clicking on the button below.

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Daniel

about our ideas?