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THE MORTGAGE AND REAL ESTATE
MARKETING PLAYBOOK

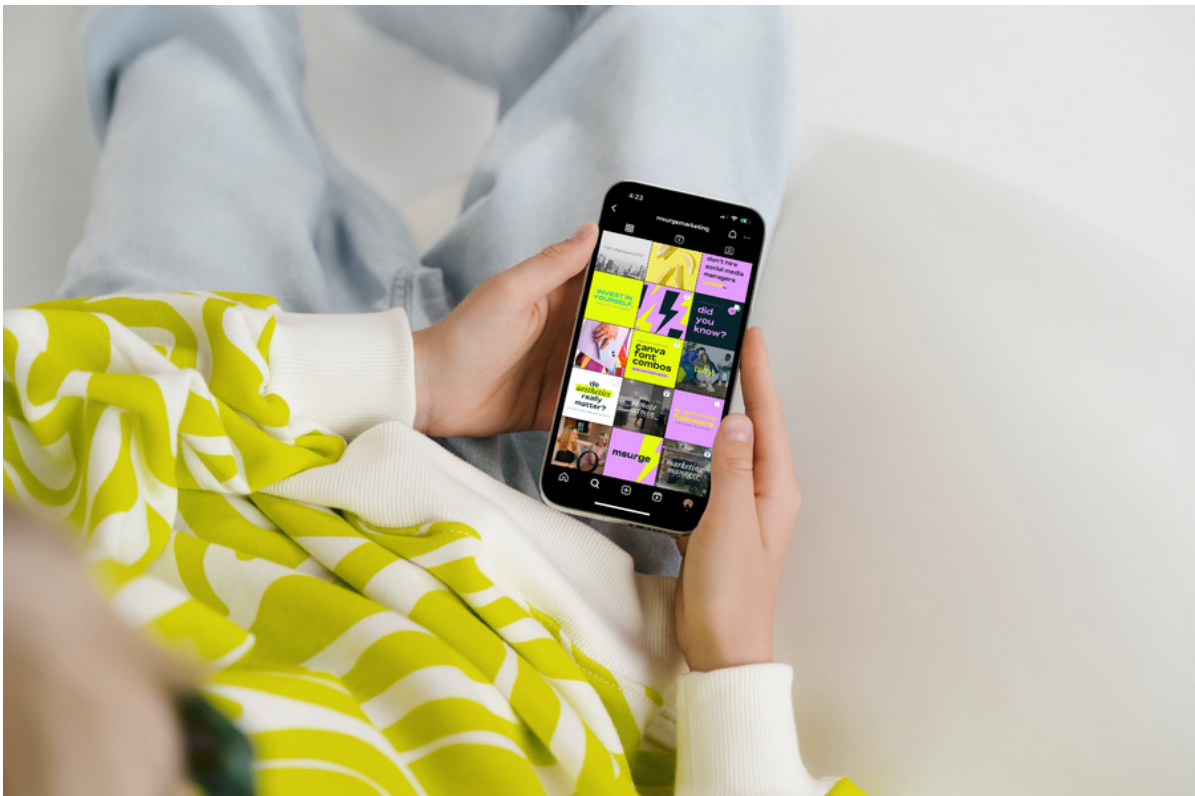
Building Community Through Your Brand



Introduction



Welcome to the Mortgage and Real estate Marketing Playbook! This comprehensive guide, brought to you by Msurge Marketing Agency, is designed to equip you with the tools and tips you need to elevate your digital and in-person marketing strategies. Whether you're a seasoned loan officer or just starting out, this playbook will help you unlock new levels of success in the ever-evolving world of marketing. Let's dive in and discover how you can maximize your impact and achieve remarkable results.



THE IMPORTANCE OF VALUES IN BRANDING

- What values were important to you in a personal relationship?
- What are the core values of your business?
- What values were important to you growing up?
- Describe what these values mean to you
- How can these values resonate with your audience?
- Describe what these values mean to you
- How would you like your community members to feel when they engage with your brand?
- How can you take these values and transfer it to your business?

Notes:

UNDERSTANDING YOUR AUDIENCE AND YOUR IDEAL CLIENT BASED ON YOUR VALUES

Understanding your audience and ideal client based on your values is essential for effective communication, building authentic relationships, targeted marketing, and differentiation.

- Who is your target audience?
- What are the main challenges your audience faces?
- Write three solutions to your audiences challenges?
- How does your brand currently interact with your audience? (e.g., social media, email newsletters, events)
- What are your audience's preferred communication channels?
- Who is the villain?
- What is the risk if you don't do anything?
- How will your business improve their life?
- What keywords are my customers using to search for me?

Notes:

HOW CAN I ENGAGE WITH MY AUDIENCE AND BUILD A COMMUNITY?

SOCIAL MEDIA

- What hashtags can I use that reflect my business and my values?
- Come up with 10 content ideas based on your values
- What videos can I film that accurately reflect my values?

Notes:

THE IMPORTANCE OF YOUR CONTENT

Good social media content holds significant importance for various reasons:

1. **Increased engagement:** Well-crafted content helps drive engagement on social media platforms. By providing valuable and interesting content, you can capture the attention of your audience, encourage likes, comments, shares, and ultimately foster meaningful interactions with your followers.
2. **Building brand awareness:** Consistently delivering high-quality content helps establish your brand's presence and increase visibility. Engaging posts, informative articles, and visually appealing visuals capture the attention of users, making them more likely to remember and recognize your brand.
3. **Establishing credibility and authority:** Good social media content allows you to showcase your knowledge and expertise in your industry. By sharing valuable insights, tips, and educational content, you position yourself as a trusted authority, which helps build credibility and trust among your followers.
4. **Educating and informing clients:** Quality content allows you to educate and inform potential borrowers about various loan options, the home buying process, and financial considerations. This empowers them to make informed decisions and increases their confidence in working with you.
5. **Strengthening customer relationships:** Social media content provides an avenue to connect and engage with your audience on a personal level. By responding to comments, addressing inquiries, and actively participating in conversations, you can build strong relationships with your followers, fostering loyalty and increasing customer retention.

Remember, good social media content is not just about promoting your brand; it's about providing value to your audience and creating meaningful connections. By understanding your target audience's needs and preferences, you can create content that resonates with them and drives positive engagement.

Basic Social Media Tips and Tricks

- **Be Consistent:** Consistency is key when it comes to social media. Regularly post content to keep your audience engaged and interested. Create a content calendar and schedule your posts in advance to maintain a consistent presence.
- **Know Your Audience:** Understanding your target audience is crucial for effective social media marketing. Research their demographics, interests, and preferences. Tailor your content accordingly to resonate with your audience and drive engagement.
- **Engage with Your Followers:** Social media is all about building connections. Respond to comments, messages, and mentions promptly. Show appreciation for positive feedback and address any concerns or complaints in a professional and helpful manner.
- **Use High-Quality Visuals:** Visual content tends to perform better on social media. Invest in high-quality images, videos, and graphics that are visually appealing and align with your brand. Remember to optimize your visuals for each platform's specifications.
- **Analyze and Adjust:** Regularly monitor your social media analytics to evaluate the performance of your content. Pay attention to metrics like reach, engagement, and conversions. Use these insights to refine your strategies and make informed decisions for future campaigns.



Remember, these are just basic tips and tricks. The social media landscape is constantly evolving, so it's important to stay updated with the latest trends and best practices.

TOP 50 HASHTAGS



Loan officers can use a variety of hashtags to enhance their social media presence. Here are the top 50 hashtags that loan officers should consider using:

- | | |
|----------------------------|--------------------------|
| 1. #mortgage | 26. #loantips |
| 2. #realestate | 27. #homerefinance |
| 3. #realtor | 28. #mortgageloanofficer |
| 4. #mortgagebroker | 29. #homeloanexpert |
| 5. #home | 30. #mortgagetips |
| 6. #realestateagent | 31. #homeloansolutions |
| 7. #firsttimehomebuyer | 32. #loanhelp |
| 8. #refinance | 33. #mortgageadvice |
| 9. #newhome | 34. #mortgageconsultant |
| 10. #loanofficer | 35. #mortgageexpert |
| 11. #homeloan | 36. #loanoptions |
| 12. #homeloans | 37. #loanadvice |
| 13. #homebuying | 38. #loanconsultant |
| 14. #homemortgage | 39. #realestatefinancing |
| 15. #mortgagelender | 40. #mortgagelending |
| 16. #mortgageprofessionals | 41. #mortgagetrends |
| 17. #mortgagerates | 42. #homeloanadvice |
| 18. #mortgagebrokerage | 43. #mortgageknowledge |
| 19. #mortgagespecialist | 44. #homeloanconsultant |
| 20. #mortgagesolutions | 45. #mortgagemarketing |
| 21. #mortgagebanking | 46. #mortgageservices |
| 22. #mortgageindustry | 47. #finance |
| 23. #homeloanspecialist | 48. #money |
| 24. #loanapproval | 49. #financialadvisor |
| 25. #loanprocess | 50. #realestateinvesting |

These hashtags can help loan officers reach a wider audience and connect with potential clients on platforms like Instagram, Twitter, and TikTok. Remember to use relevant and popular hashtags to maximize visibility and engagement.

FUN NATIONAL HOLIDAYS



Here is a list of 25 fun days to celebrate on social media to boost engagement.

1. January 14th: National Dress Up Your Pet Day
2. January 16th: National Nothing Day
3. January 21st: National Hug Day
4. January 25th: Opposite Day
5. February 4th: Eat Ice Cream for Breakfast Day
6. February 4th: Thank Your Mailman Day
7. March 1st: World Day of Prayer
8. May 4th: Kentucky Derby Day
9. May 4th: Star Wars (May the 4th Be With You) Day
10. June 8th: Best Friends Day
11. June 18th: International Sushi Day
12. July 6th: World Kissing Day
13. August 8th: International Cat Day
14. August 19th: World Photo Day
15. September 13th: Positive Thinking Day
16. October 4th: National Taco Day
17. November 3rd: Sandwich Day
18. December 1st: Giving Tuesday
19. December 31st: New Year's Eve

Please note that this list includes both official and unofficial holidays and observances, and it's always a good idea to check local calendars and cultural norms for specific celebrations.

Remember, when posting about fun national holidays, ensure that they align with your brand and resonate with your target audience. Be authentic, creative, and have fun with your content to make the most of these opportunities.

CONTENT TOPIC IDEAS TO USE IN YOUR SOCIAL MEDIA



The below topic suggestions are versatile enough to be creatively transformed into both compelling social media graphics and engaging videos or reels.

- Big market updates
 - Loan limit
 - Fannie Mae updates
 - Guideline changes
- Success Stories
 - Highlight client success stories and testimonials to showcase your expertise
- Showcasing your behind the scenes of your day
 - Events attended
 - Community
 - Family / vacations
- FAQs that come up during your conversations with clients
 - How do I know which loan product is right for me?
 - How do we get started?
 - How quickly can I get approved?
- Loan products and its benefits
 - New product offerings
- Common myths
 - 20% down payment
 - Student loans
 - Being debt-free in order to own a home
- Addressing client's current market concerns
 - What will you do to help them overcome that challenge?
- Mortgage and Financial Education
 - Did you know?
 - Tools and resources



CONTENT TOPIC IDEAS TO USE IN YOUR SOCIAL MEDIA CONTINUED...

- Things you hear that clients shouldn't do
- Quick tips
 - How to save for a down payment
 - Things you shouldn't do after applying for a mortgage
 - How to boost credit score
 - How to use your tax return to reach real estate goals
 - Preparing for homeownership
- Finding the right lender or real estate agent
- General homeowner tips
 - Seasonal (ex: winter home maintenance)
- Homeownership prep
 - Not ready to buy now? Here's how you can set yourself up for success for when you are eventually ready
- Collaborations with industry partners
 - Collaborate with realtors, builders, financial advisors, attorneys to cross promote each other's services and widen the variety of audiences.
- Provide Local Expertise
 - Highlight your knowledge of the local market by sharing information about neighborhoods, schools, local events, and community resources.
- Bank vs. Mortgage Company



You can use these topics to plan out your monthly content. See the next page for a **complimentary** content calendar to help organize your ideas.

Benefit of branding yourself on social media

01

ESTABLISH CREDABILITY

By creating a strong personal brand on social media, you can establish yourself as an expert and build credibility in your industry. Sharing valuable content, insights, and expertise can help potential clients see you as a trusted authority in the field of lending.

02

SHOWCASE YOUR EXPERTISE

Social media allows you to showcase your knowledge and expertise in the mortgage industry. Through informative posts, videos, and live sessions, you can educate your audience about various loan products, provide tips for homebuyers, and address common concerns. This positions you as a go-to resource for mortgage-related information.

03

BUILDING TRUST AND RELATIONSHIPS

Social media provides a platform for you to connect with your audience on a more personal level. By sharing authentic stories, engaging in conversations, and showcasing your personality, you can build trust and foster meaningful relationships with potential borrowers.

04

STAYING TOP OF MIND

Social media provides a way for you to stay connected with past clients and industry professionals. By consistently engaging with your audience, sharing updates, and celebrating milestones, you can remain top-of-mind when they or someone they know needs a loan officer.

Mortgage and Real Estate Marketing

Trends to Look For in 2024



01

INCREASED USE OF VIDEO CONTENT

Video continues to be a powerful tool for engaging with potential buyers. Real estate and mortgage professionals will utilize platforms like YouTube, Instagram, and TikTok to showcase properties, share virtual tours, provide market updates, etc.

03

INTERACTIVE CONTENT AND VIRTUAL EXPERIENCES

As technology evolves, so does the demand for interactive content. Real estate professionals will leverage augmented reality (AR) and virtual reality (VR) technologies to create immersive experiences for potential buyers, allowing them to virtually walk through properties and explore neighborhoods.

02

INFLUENCER COLLABORATIONS:

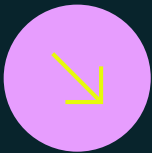
Social media influencers have significant reach and influence over their followers. Real estate marketers will collaborate with relevant influencers in the industry to promote properties, share testimonials, and expand their online presence.

04

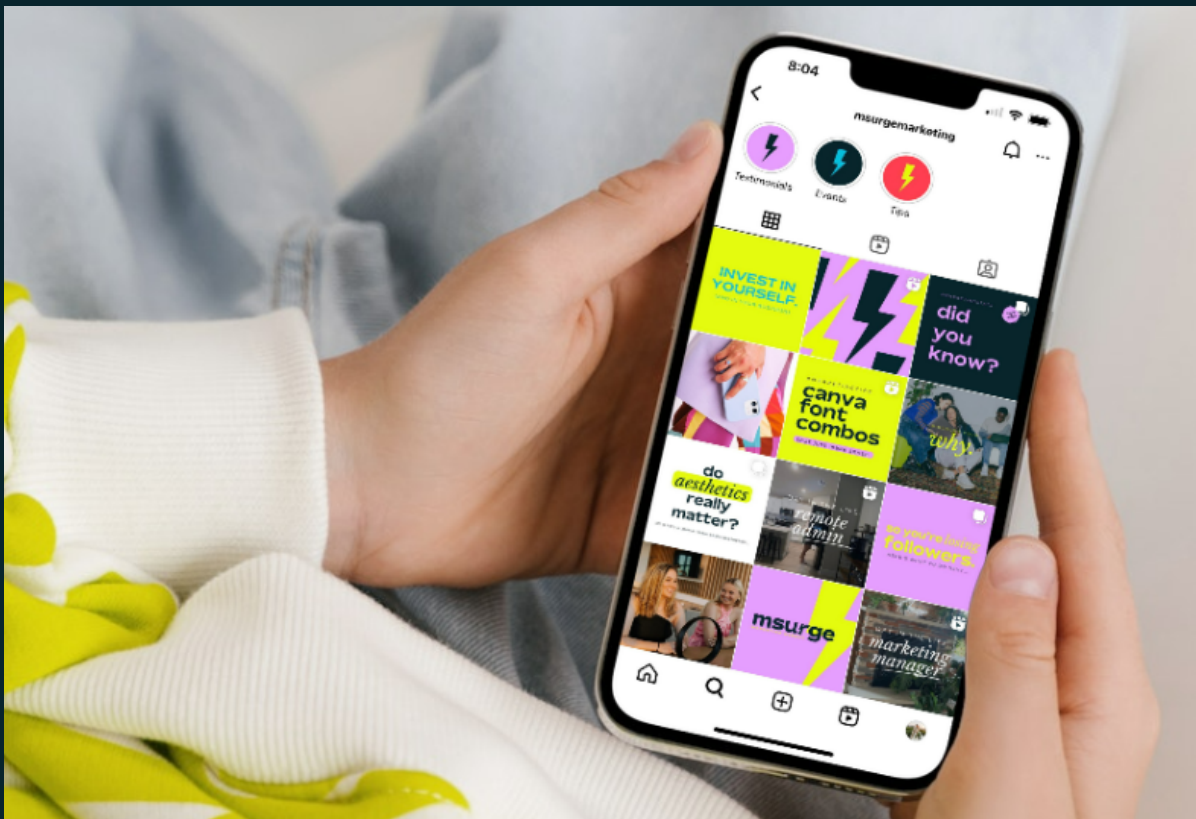
SOCIAL LISTENING AND ENGAGEMENT

Marketers will actively monitor social media platforms for mentions, reviews, and comments related to their brand or properties. They will engage with users, respond to inquiries, and address concerns promptly, building trust and establishing strong customer relationships.

Effective Social Media Posting Strategies



The world of social media marketing is dynamic and constantly evolving. Understanding the nuances of your audience's behavior can significantly boost the effectiveness of your content strategy. Here are a few things to remember as you begin to plan your monthly content.



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A few things to remember...

01

AVOID HEAVY OR EDUCATIONAL CONTENT ON WEEKENDS

Weekends are typically a time for relaxation and leisure activities. Your audience might not be in the mood to consume heavy or educational content during this period. Instead, focus on sharing light-hearted, entertaining, or inspirational posts that align with their weekend vibes. This approach can lead to higher engagement rates and a stronger connection with your audience.

02

KEEP FRIDAY'S LIGHT

By Friday, many people are wrapping up their work week and gearing up for the weekend. Their attention span for educational content may be shorter. Therefore, it's advisable to keep your posts on Fridays casual, fun, and easy to digest. Share something that will bring a smile to their faces or spark intrigue without requiring much mental effort.

03

DAILY POSTING ISN'T ALWAYS KEY TO SUCCESS

While consistency is crucial in social media, posting every single day isn't necessarily a must for success. Quality trumps quantity. It's better to share valuable, well-thought-out content a few times per week than to post mediocre content daily. Always prioritize delivering value to your audience over filling up their news feed.

04

LEVERAGE HOLIDAYS FOR CONTENT CREATION

Acknowledging holidays and observances is a quick and easy way to come up with content ideas. Not only does this show that your brand is aware of what's happening in the world, but it also allows you to connect with your audience on a more personal level. You can create themed posts, run holiday specials, or simply send well-wishes to your followers.

HOW CAN I ENGAGE WITH MY AUDIENCE AND BUILD A COMMUNITY?

Events

- Based on my values, what events could I host? (list 3)

1.

2.

3.

- How do these events support my values?

- What will my target audience get out of hosting these events?

- I will commit to hosting _____ number of events this year

Notes:

The Power of Hosting Events in the Mortgage and Real Estate Industry

The real estate and mortgage industry is a people-first business. It thrives on relationships, trust, and human connection. Given this, hosting events can be an incredibly effective way to not only drive business but also strengthen ties with clients and prospects. Here's why events are so valuable in this industry.

Building Relationships

Events offer face-to-face interaction with potential clients, enabling you to position yourself as a trusted advisor. This close contact builds trust, a crucial factor in this industry.

Showcasing Expertise

Use events to display your knowledge through seminars or workshops. Demonstrating your expertise attracts clients and positions you as an industry authority.

Networking Opportunities

Events provide a platform for networking with industry professionals, leading to potential partnerships and referrals that can boost your business.

Fulfilling the Human Need for Connection

In our digital world, face-to-face interaction is increasingly valued. Events cater to this need, making clients more likely to choose and recommend you.

Hosting events is a powerful strategy for driving business in the real estate and mortgage industry. It offers a platform for building relationships, showcasing expertise, networking, and fulfilling the human need for connection. So, start planning your next event today and watch your business grow.

GUIDE TO HOSTING SUCCESSFUL EVENTS



Define Objectives:

- Determine the goals and purpose of the event.
- Clarify what you hope to achieve, such as generating leads, building relationships, or educating attendees.

Identify Target Audience:

- Identify the specific group of people you want to attract to your event.
- Consider their demographics, interests, and needs.

Choose Event Format:

- Decide on the format of your event, such as a seminar, workshop, networking event, or webinar.
- Consider whether it will be an in-person or virtual event.

Set Budget:

- Establish a budget for your event, including venue costs, marketing expenses, speaker fees, catering, and any other relevant expenses.

Select Date and Venue:

- Choose a date and time that works best for your target audience.
- Find a suitable venue that accommodates your expected number of attendees and meets your event requirements.

Plan Event Schedule:

- Create a detailed schedule of the event, including session timings, breaks, and any additional activities.
- Ensure a balance between informative sessions, interactive elements, and networking opportunities.

Arrange Speakers and Presenters:

- Identify and invite industry experts, guest speakers, or panelists who can provide valuable insights and expertise.
- Confirm their availability and topics of presentation well in advance.

Develop Content:

- Prepare engaging and educational content for your event.
- Create presentations, handouts, and any other materials that will help deliver your message effectively.

Marketing and Promotion:

- Develop a marketing plan to promote your event.
- Employ various channels such as social media, email marketing, website promotion, and targeted advertising to reach your target audience.

GUIDE TO HOSTING SUCCESSFUL EVENTS



Registration and Ticketing:

- Set up an online registration system or ticketing platform to manage attendee registrations.
- Collect necessary information and provide clear instructions for registration.

Coordinate Logistics:

- Arrange necessary equipment, including audiovisual systems, projectors, and microphones.
- Coordinate with the venue staff to ensure a smooth setup and logistics, such as seating arrangements, signage, and catering.

Prepare Event Materials:

- Print any necessary materials, such as name badges, event programs, handouts, and branded materials.
- Organize all materials in advance for easy distribution at the event.

Attendee Communication:

- Send regular updates and reminders to registered attendees about the event details, schedule changes, or any additional information they need to know.

On-site Management:

- Assign staff members or volunteers to help manage various aspects of the event, such as registration, session coordination, and attendee assistance.
- Conduct a pre-event briefing for the team to ensure everyone is aware of their roles and responsibilities.

Follow-up and Evaluation:

- After the event, follow up with attendees to express gratitude and gather feedback.
- Evaluate the success of the event based on your objectives and attendee feedback.

By using this checklist, you can ensure that you cover all the essential elements necessary to plan and execute a successful event as a loan officer.

Note: This checklist is intended as a general guide and may require customization based on the specific requirements and circumstances of your event.

EVENT IDEAS BASED ON VALUES



SELF CARE

- Yoga
- Fitness class
- Meditation or breathwork
- Organized walk
- Nutrition class
- Book club
- Wellness retreat
- Art therapy

GROWTH

- Business planning
- Vision board party
- Mastermind

COMMUNITY

- Volunteering at a local charity of your choice
- 5K
- Walk for a cure
- Adopt a family for the holidays

GENEROSITY

- Charity fundraiser
- Community clean-up
- Food drive
- Toy drive or gift exchange

DISCIPLINE

- Financial planning seminar
- Time management workshop
- Fitness Challenge
- Professional Development workshop

MONEY

- Building your credit
- Best savings and checking accounts
- Investments

EDUCATION

- First time homebuyer seminar
- Lunch & learn
- Understanding your credit
- Pre Approval seminar
- Understanding loan programs

FAMILY

- Sporting events
- BBQ
- Movie night at a local theatre
- Holiday celebration

FUN

- Wreath making class
- Cooking class
- Cocktail making class
- Flower Bouquet bar
- Golf outing

HOW CAN I ENGAGE WITH MY AUDIENCE AND BUILD A COMMUNITY?

COLLABORATIONS

- List 5 business, referral partners, or community organizations I can collaborate with (ex: events, social media collaborations, lives, reels, etc)

1.

2.

3.

4.

5.

Notes:

BUILDING TRUST AND CREDIBILITY

Three ways to build trust and credibility

- Consistency
 - Authenticity
 - Providing Value/ resources
-
- How can I show my authenticity through social media?
-
- Based on my values, I can provide resources about...
-
- Who can I ask right now for a review?
-
- I will commit to posting valuable content of _____ times per week

Notes:

SOCIAL MEDIA TIPS + TRICKS

Personal Branding

- Determine what you want to be known for (values)
- Invest in professional pictures
- Focus on authenticity rather than virality
- Position yourself as an expert by sharing valuable content
- Be consistent with your branding to become easily recognizable to your audience

Content Creation

- Follow other leaders in your industry to stay up to date on trends and topics
- Create quality video content
- Invest in tools that make content creation easier
 - Tripods, ring lights, etc.
- Experiment with different types of content and keep track of what performs best
 - Engaging questions, reels, blog-type posts, etc.
- Utilize keywords and hashtags to improve the discoverability of your content

Engagement

- Consistently respond to comments
 - Respond to comments with questions to prompt more engagement
- Post engaging questions
- Collaborate with others
- Share content from others in your field
- Offer incentives in exchange for feedback
- Run interactive contests or giveaways
- Utilize CTA's when necessary

Notes:

LETS DO A FINAL RECAP

- My values are
- My target audience is
- The problem I am solving is
- My ideal client is
- My CTA is
- I am committing to ____ number of events
- I will post _____ times per week

Notes:

**Stay Unforgettable, Stay Ahead,
and Surge Past the Competition**
-msurge

MSURGE X MORTGAGE GIRLFRIENDS CONFERENCE OFFER

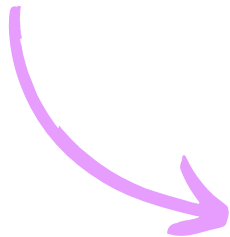
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