

# Broker Digital Marketing Toolkit

Everything You Need to Know to Get Started with Digital Marketing to Real Estate Investors



VisioLending.com

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At Visio Lending, we believe your success is our success. We strive to provide our brokers with the tools to be successful and grow with us. The Visio Lending Marketing Department put this Digital Marketing Tool Kit together to help Viso Brokers.

# Social Media Marketing



## Why Social Media Marketing is Important to Brokers

You may be wondering if you need social media marketing. Social media marketing gives you the power to leverage content to reach the masses. You can deliver messages quickly to your audience and with consistent effort, you can grow your audience with prospective clients. Social media marketing allows you to stay top of mind with current and new clients.

### **According to the Scotsman Guide**

- ▶ Employees on average have 10 times more followers on social media than their company.
- ▶ 82 percent of people are more likely to trust a company when senior executives are active on social media.

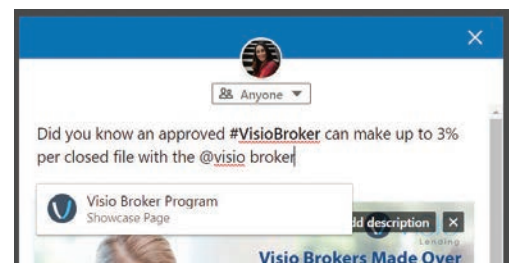
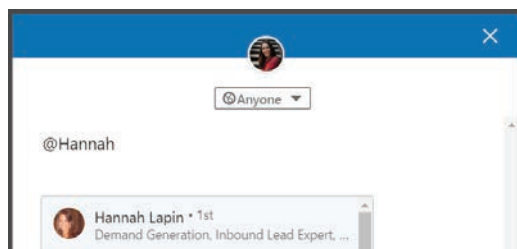
## Where to Start on Social Media

Here are some things to keep in mind.

- ▶ When posting, always present your content in a professional manner.
- ▶ Your goal is to always be perceived as a reputable and trusted expert.
- ▶ Don't be too sales-y. You want to be viewed as an expert and an expert doesn't need to prove anything - they just continue to showcase their expertise.
- ▶ LinkedIn and Facebook are two platforms that are heavily used in the mortgage industry.
  - LinkedIn is a professional network to stay connected with colleagues and clients and to make more potential partnerships. Make it a habit to connect ("add") those you would like to stay in touch with and those who could benefit from your content. [Link: 10 LinkedIn Tips for Brokers](#)
  - Facebook is more candid with friends, families and lots of pet photos. [Link: 8 Facebook Tips for Brokers](#)

## Social media tips to boost your exposure

- ▶ Remember to tag people if you are mentioning them. You can do this by using the @ sign followed by typing out the name of the person or page you would like to tag. Tagging people and pages typically increases visibility of your posts.





- ▶ Never post just to post. It's better to have quality 2-3 posts a week rather than 5-6 irrelevant posts.
- ▶ Tag your location on Facebook! If you are at an industry event, always tag your location and use the proper event hashtag if applicable.
- ▶ Use relevant and popular hashtags on LinkedIn to increase the reach of your post. You can even follow hashtags to see what others are posting about. Here are some popular industry hashtags:
  - #interestrates
  - #financing
  - #investments
  - #realestate

### **Social media tips to boost your engagement**

- ▶ Incorporating a question, or even a current event/topic will make your post more appealing for engagement.
- ▶ Engage with your feed routinely when you're on your social media platforms. The more engaged you are, the more people (and potential clients) will see your posts and engage back. Bonus tip: The more people are engaged with your post, the more others will see it. (a.k.a. the social media algorithm).
- ▶ Stay engaged by commenting, liking and sharing posts on your feed.

### **Social Media Content Ideas**

- ▶ Share success stories about your happy investors and clients.
- ▶ Share your positive reviews, thanking your clients for their kind words.
- ▶ Re-share content from industry leaders that is relevant and appealing to your clientele.

- ▶ Facebook can be more candid since it is more personal
  - Use pet photos, share your family, continue posting all your candid posts – the more people engage with you regularly, the more likely they will see your mortgage centric posts.
  - Make your posts funny – use memes about the crazy mortgage industry, make light of all the hard work you do.
  - If you do a post in hopes to get clients or industry event-related, consider making that post public.

## Sample Social Media Posts

### Sample 1

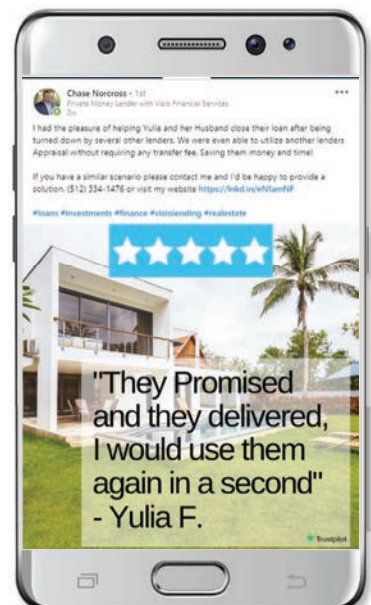
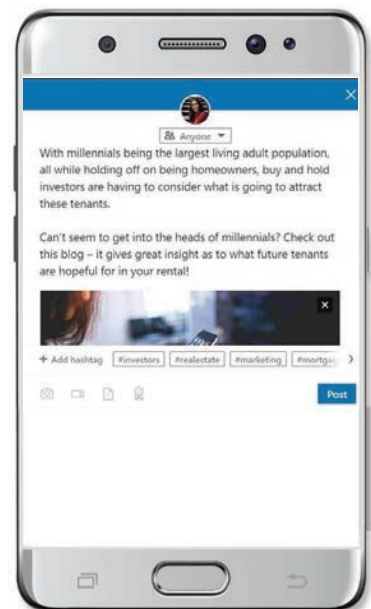
This post showcases industry insight while hitting a marketable pain points in hopes to earn trust from potential partners and clients.

It's important to have consistency. Social media marketing tends to be a snowball that can turn into an avalanche of good borrowers if you keep at it. Your goal should be to be perceived as an industry expert, so when a borrower is in need of financing, they turn not only to your content, but to you for your expertise and services.

### Sample 2

This post incorporates a positive review with gratitude, an overcome hurdle, branding and success!

Want to learn more? Check out [LinkedIn Learning](#) or [Facebook Blueprint](#)



# Email Marketing



## Why Brokers Need Email Marketing

According to Constant Contact (an email marketing platform):

- ▶ Email generates \$38 for every dollar spent (3,800% ROI!).
- ▶ Email use worldwide will top 3 billion users by 2020.
- ▶ 72 percent of consumers prefer email as their source of business communication.
- ▶ 205 billion emails are sent every day.

## Getting with Email Marketing

*Download: 5 Questions Brokers Can Use to Find Rental Loan Clients*

The first step in email marketing is deciding how you want to send your emails. While Gmail or Yahoo are great servers to host your email account, it is challenging to regularly bulk email your clientele that way. Here are two email marketing platforms we like and why:



### Constant Contact

**Features:** User-friendly and customizable email templates, contact management, tracking tools on email marketing statistics, triggered emails such as a welcome email to new subscribers, image library, pop-up forms, and ability to send unlimited emails.

**Pricing:** Varies based on the features and number of contacts, starts at \$20 with up to 500 email contacts.

**What it's best for:** Beginner email marketers looking for a simple, user-friendly, and reliable platform.

### Mailchimp

**Features:** User-friendly and customizable email templates, contact management, tracking tools on email marketing statistics, email campaign organization, pop-up forms, landing pages, automated emails.

**Pricing:** Varies based on the features and number of contacts, start FREE with a list of up to 2,000 contacts and 12,000 emails per month. Upgrade to \$10 a month for unlimited.

**What it's best for:** Comprehensive marketing all-in-one solution at incredibly affordable pricing.



## **Kinds of Emails to Send**

### **Product Marketing Emails**

Share with your database the kinds of products and services that you offer. Use your products to provide solutions for your clients' needs. (Example: Non-qm rental loans are designed to help investors leverage properties based on cash flow rather than DTI.) By doing this, you are answering the questions your clients may not know how to ask.

### **Relationship Building Emails**

This can be a variety of different kinds of emails that are meant to build relationships with your database. It could be warm holiday wishes or just checking in.

### **Content Emails**

HubSpot research found that 53% of consumers say free content on a topic they are interested in attracts them to a business. Become a resource for your clients and grow your business by providing relevant content. We offer a variety of *Investor Resources* that we welcome you to download and share.

### **Targeted Emails**

Divide your database into segments and send relevant emails based on that grouping. It could be geographic segmentation, so you send Florida clients information about Florida lenders or interest segmentation, so you send fix and flip clients information about fix and flip deals. There are a lot of possibilities of segmentation, and people are more likely to open emails that are directly relevant to them.



## Email Templates

### Introductory Email

**Preview Text:** Interested in the best loan programs and competitive financing for your investment needs?

New message ⋮ 🔍 ✕

To

Subject

Hi XXX,

My name is XXX and I am a Mortgage Broker. [Insert a sentence or two about your mortgage experience]

If you are looking for an industry expert and have a loan scenario I can help with, I would love to shop around for you and get you a competitive quote.

Contact me anytime via phone XXX-XXX-XXXX or via email {insert your email address}. Looking forward to working with you and helping you achieve your investment goals.

Sincerely,

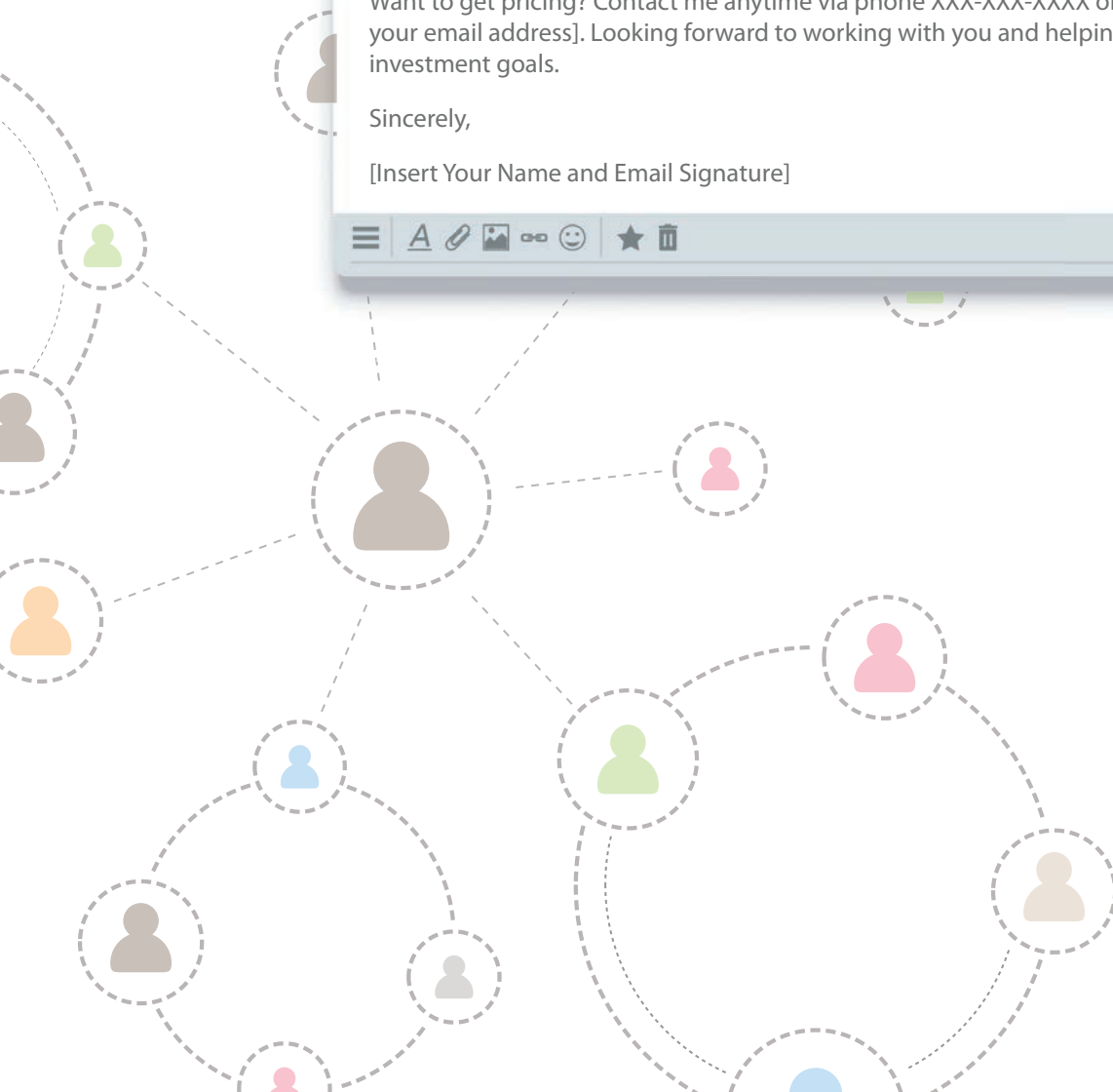
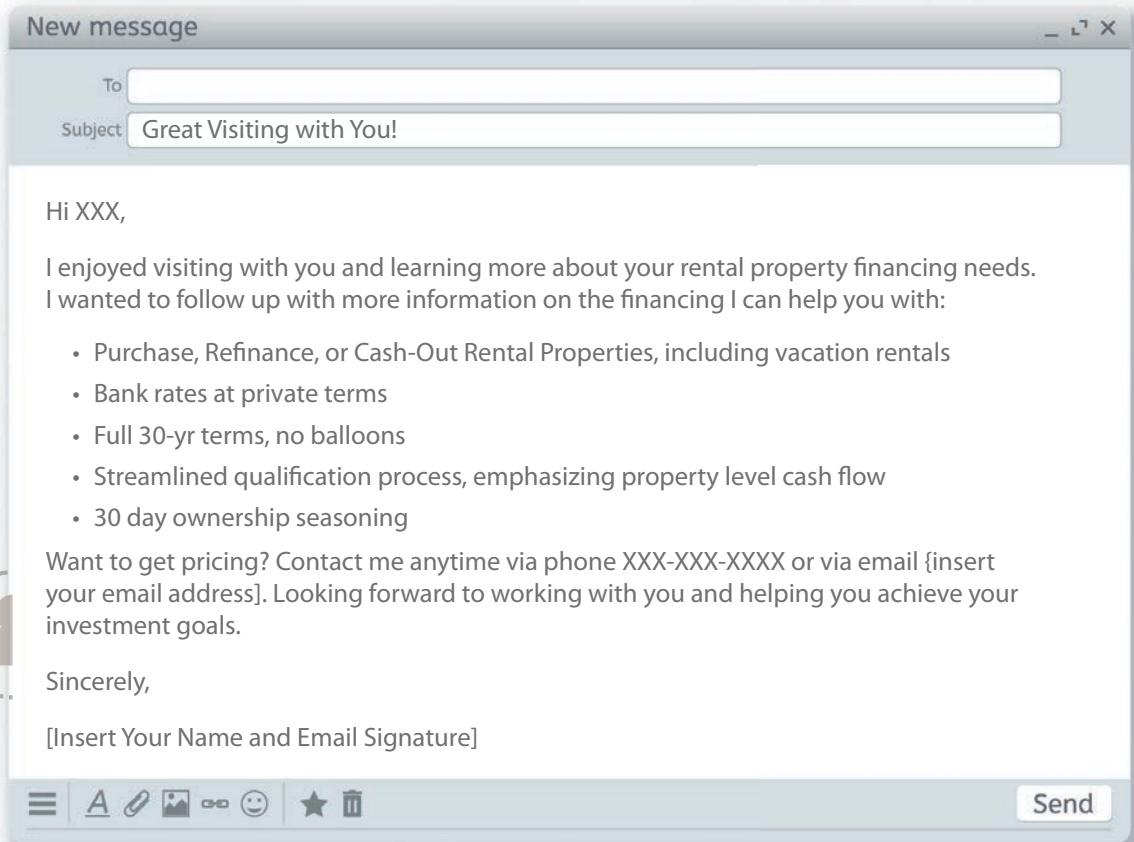
[Insert Your Name and Email Signature]

☰  📎 🖼️ 🔗 😊 ★ 🗑️ Send



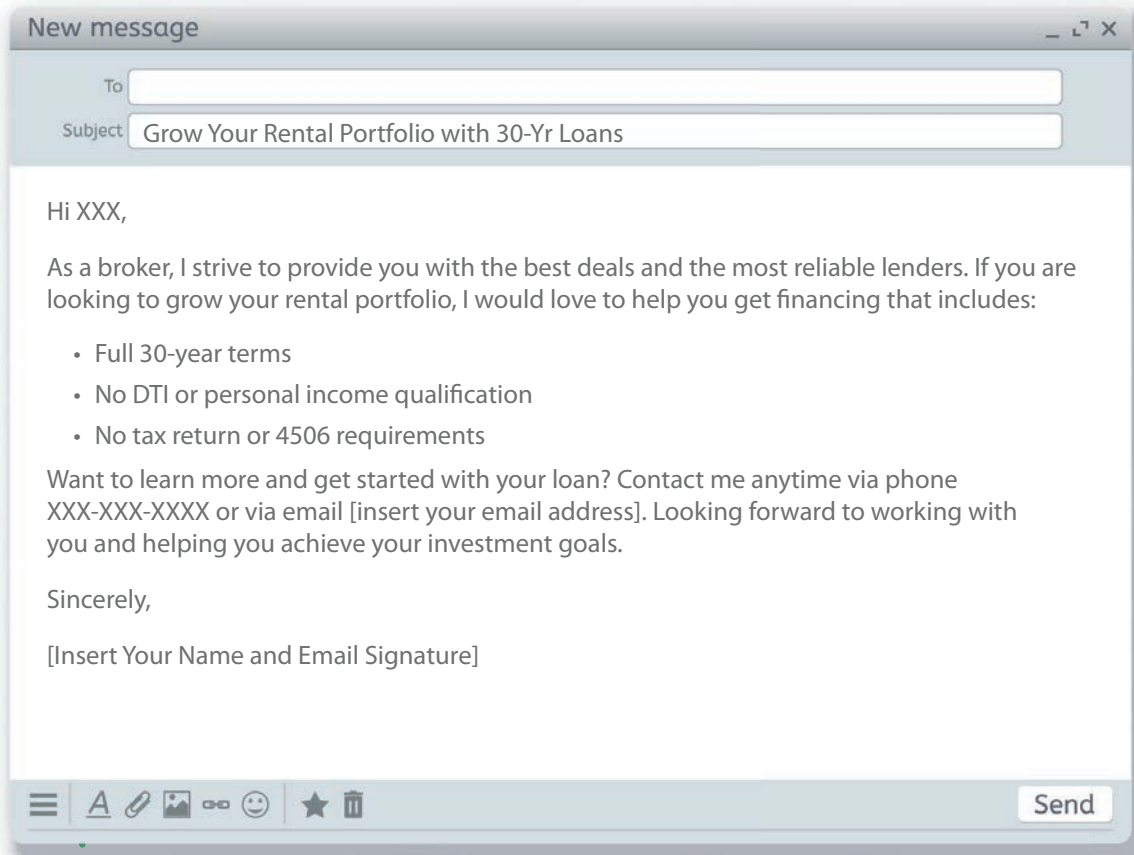
## Follow Up Email from Phone Call with Potential Rental Client

**Preview Text:** I enjoyed visiting with you about your rental property financing needs. Here is more information.



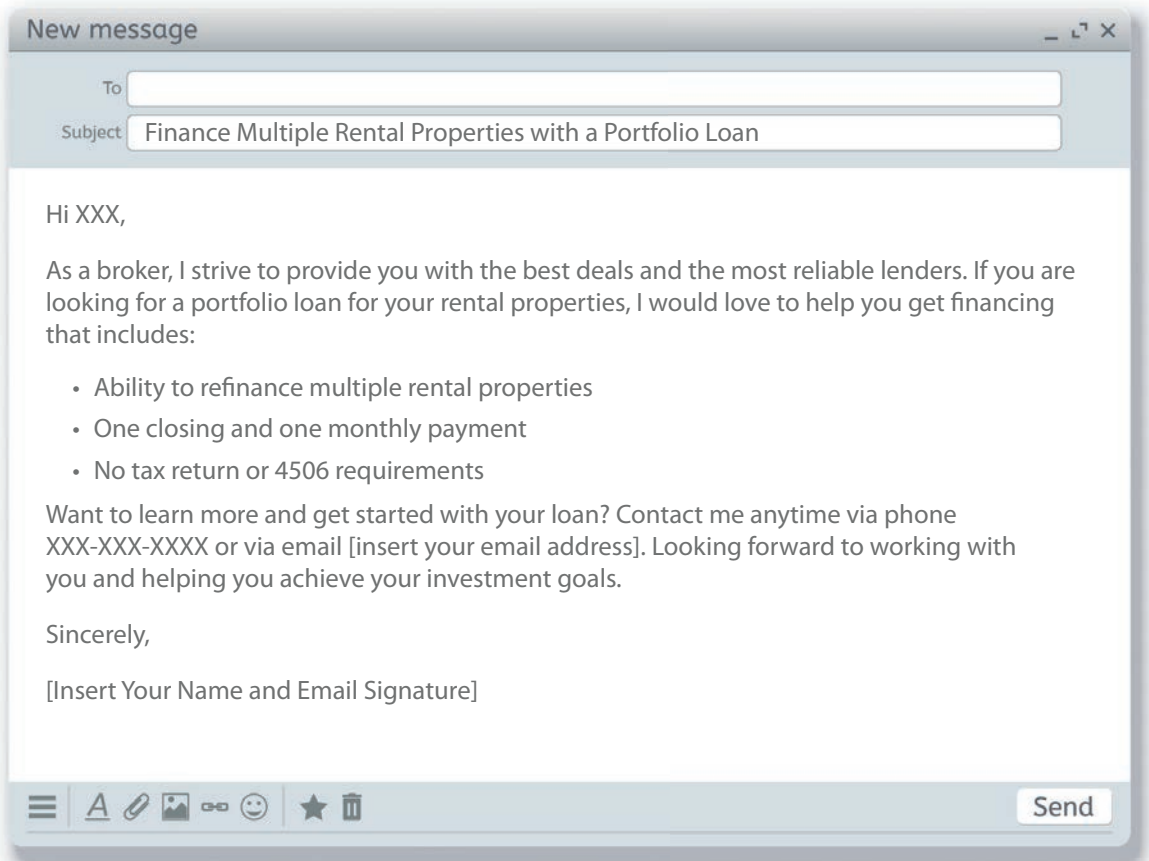
## Rental Loans Inquiry Single Asset Email

**Preview Text:** I've partnered with the nation's leader in rental loans to offer you 30-yr terms, no balloons & simple pricing based on property cash flow.



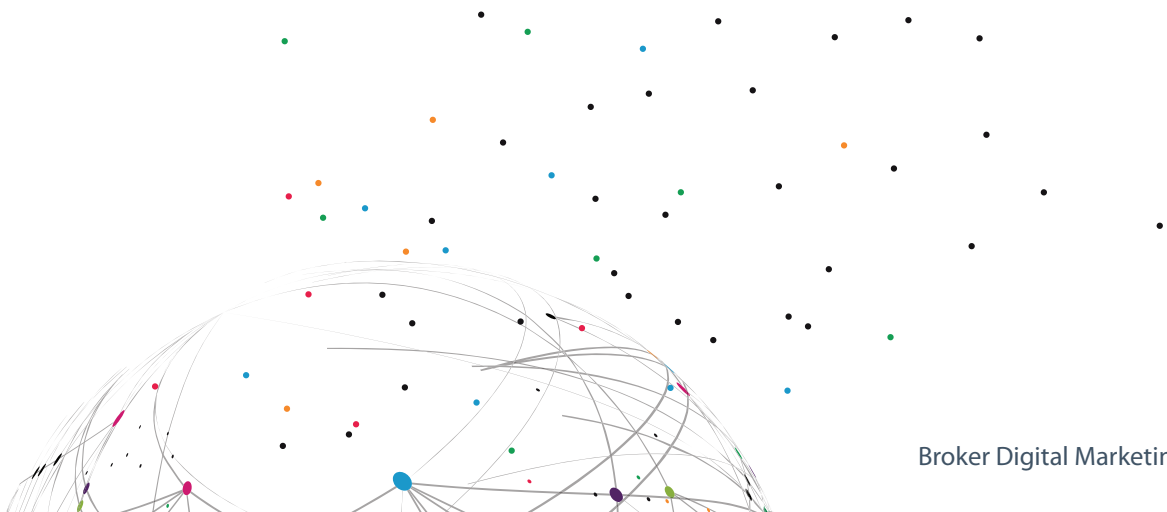
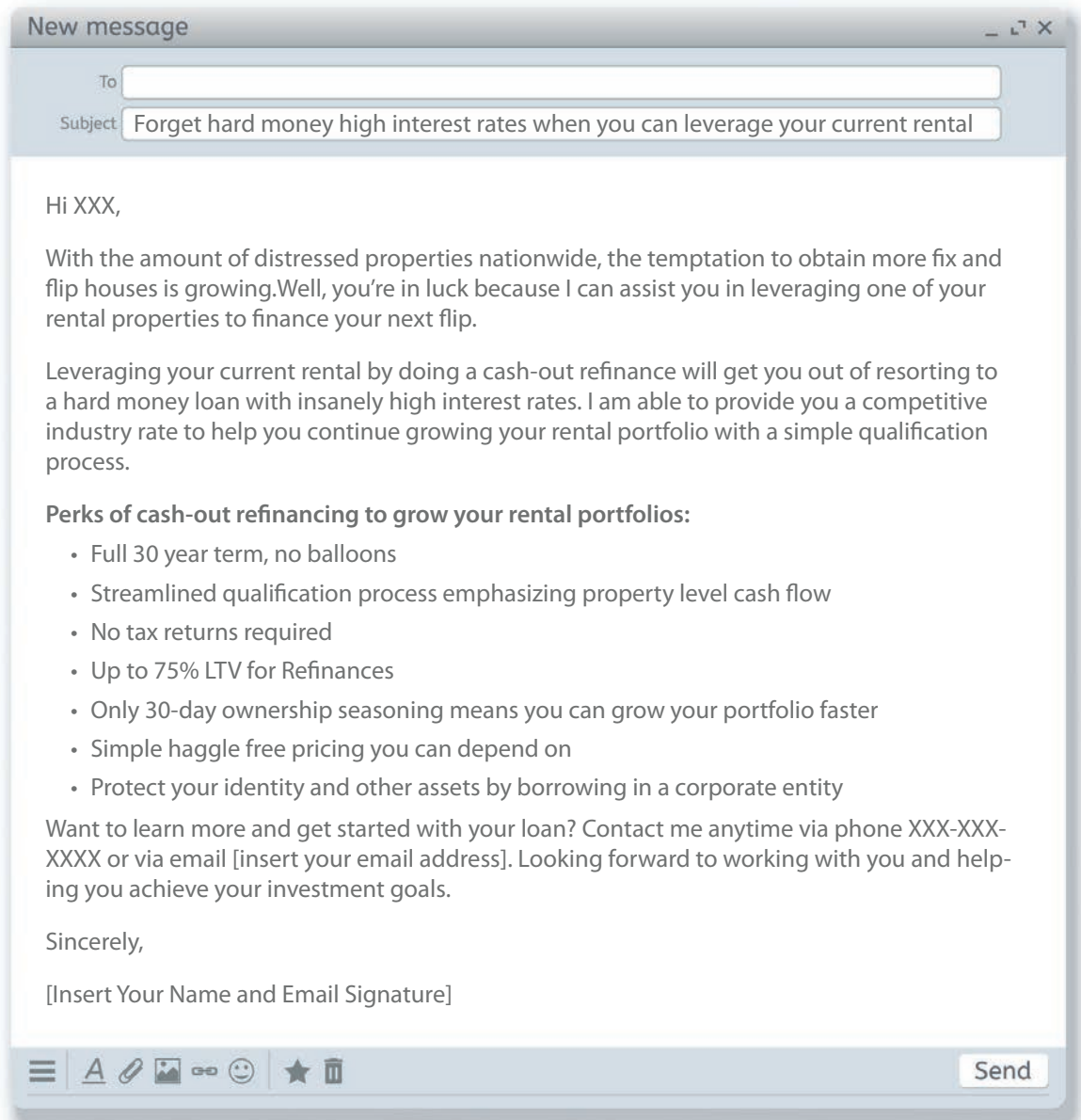
## Rental Loans Inquiry Portfolio Email

**Preview Text:** I've partnered with the nation's leader in rental loans to offer you the best portfolio loans available on multiple properties.



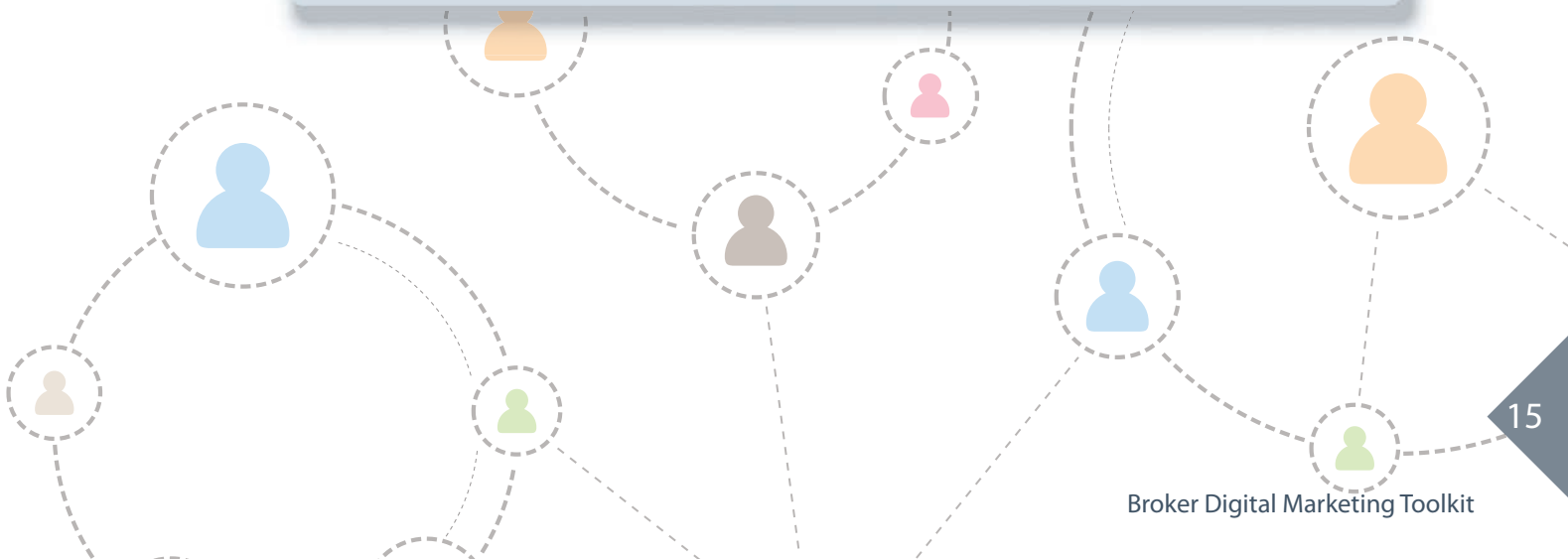
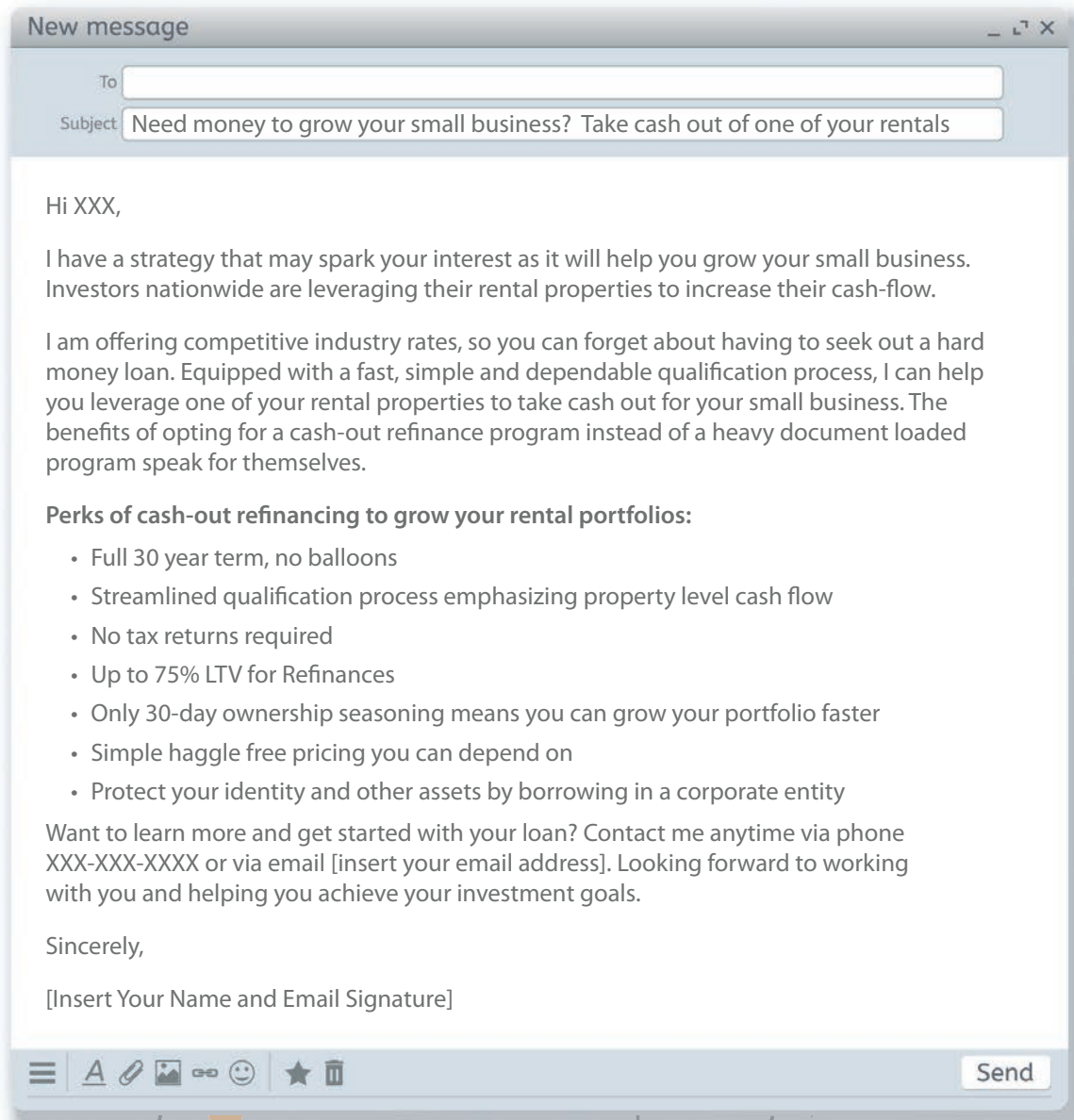
## Targeted Product Email #1

**Preview Text:** Learn how you can take cash out of one of your rental properties to help you finance your next flip!



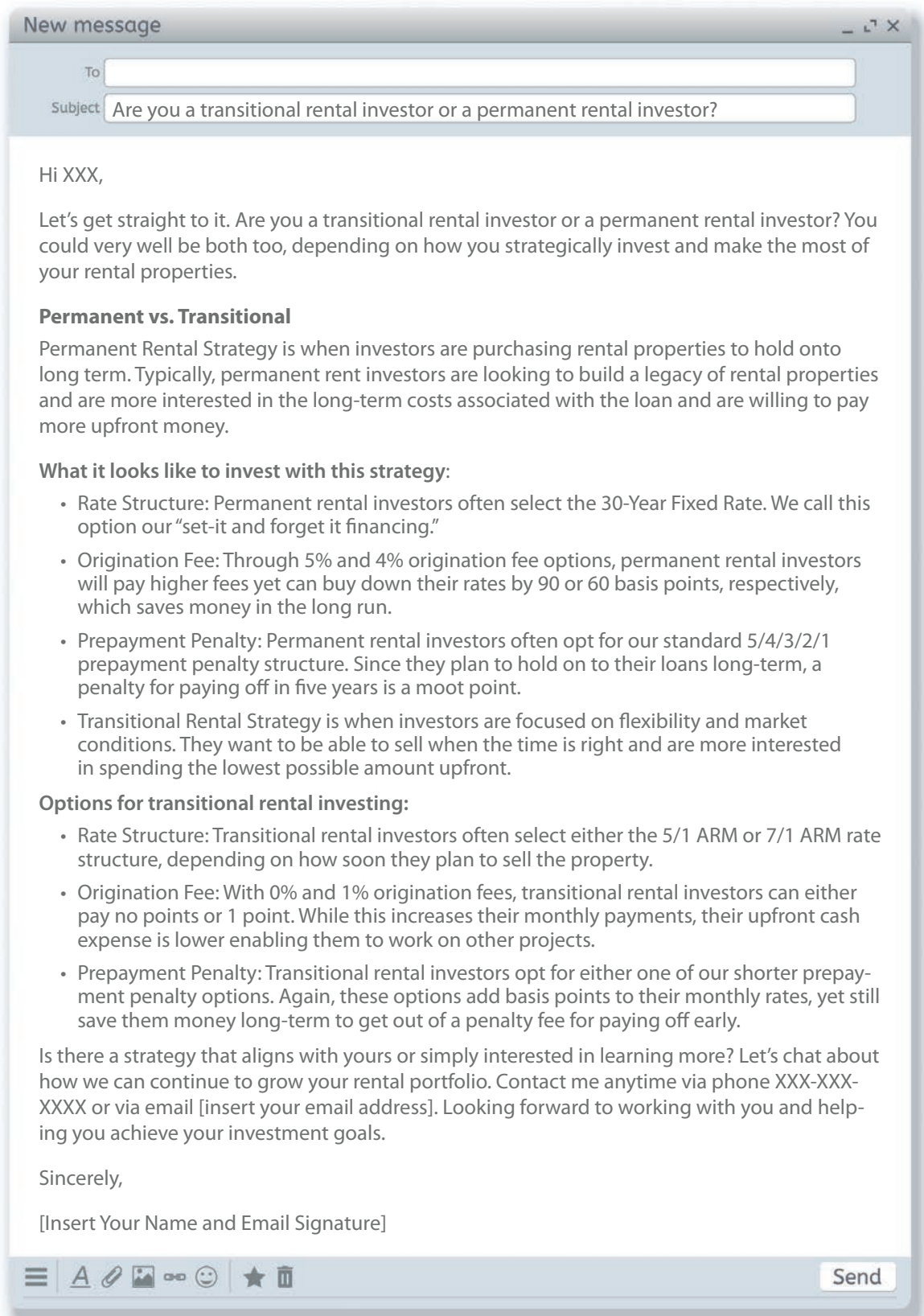
## Targeted Product Email #2

**Preview Text:** Learn how you can take cash out of one of your rental properties to help you finance your next business venture!



## Nurture Your Leads with a Program Email

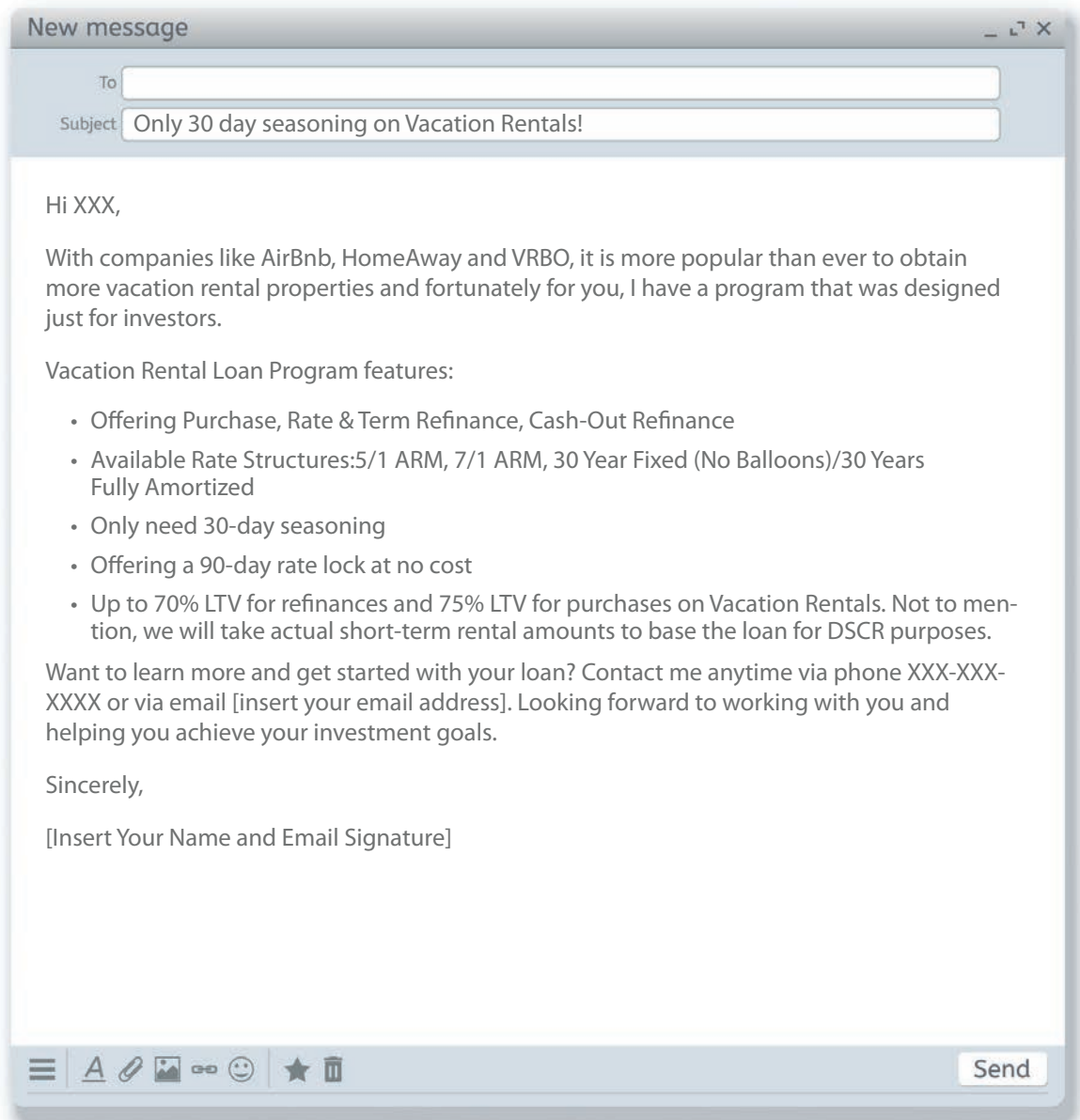
**Preview Text:** Find out the different strategies investors are using to grow their rental portfolios.





## Vacation Rental Email

**Preview Text:** By taking all your needs as an investor into consideration, I have a program to provide you vacation rental financing.



## Subject Line Ideas

Subject lines are incredibly important because they are the key deciding factor on whether or not an email gets opened.

Here are some enticing subject line ideas:

- Drumroll Please... Latest Product Updates
- Grow Your Rental Portfolio with 30-Yr Loans
- Congrats! You Qualify for Low Rates
- Now is the Time to Grow Your Rental Portfolio
- Customizable Rates & Fees to Fit Investors Needs
- Aloha! Financing for Your Hawaii Vacation Rental
- New Low Rates
- Purchase, Refinance, Cash-out Long-Term Rentals
- Low Rates and Fees, No Point Options, Pre-pay Buy-downs
- Rates as Low as X%
- Take Advantage of up to 80% LTV on Purchases
- April Update: Low Fees and Interest Rates
- Make 2019 Your Year
- Expand Your Wealth with a Cash-Out Refinance
- Update Your Investment Property, Raise Your Rents
- Should you conform?
- Fast Capital for Real Estate Investors
- Vacation Rental Financing Available Nationwide
- The Rental Market is Hot! Lock in Low 30-Yr Rates
- Income-Generating Rental Properties are a Loan Away



# Content Marketing



## Why Brokers Need Content Marketing

### According to Codeless

Codeless is a b2b, data-driven content creation marketing platform, backed by a team of long-form content writers and experts in various industries including finance and investments.

- ▶ Content marketing costs 62% less than traditional marketing endeavors yet generates 3x the amount of leads.
- ▶ Businesses who prioritize blogging efforts are 13x more likely to see positive ROI on their marketing strategy.
- ▶ Businesses with blogs produce 67% more leads per month than those without.
- ▶ 60% of consumers feel engaged/positive with a brand or company after reading custom content.

## Getting Started with Blogging

The first step in setting up a new blog is choosing a platform to host it on. What is really awesome is most blogging platforms are free. Here are two we really like:

### WordPress

**What it's best for:** Brokers looking for a website and blog hosting platform in one.

**Why we like it:** Wordpress is extremely user-friendly (no coding required) and it comes with ample free design templates you can pick from to customize your look with ease.

### Blogger

**What it's best for:** Brokers looking for a simple, stand-alone blogging solution.

**Why we like it:** Blogger is a Google partner with seamless integration into your Google accounts and fantastic analytics.

## What to Blog About

*Download: 10 Blog Post Ideas for Brokers*

One of the cool things about a blog is you can answer the questions that potential clients are looking for on Google and demonstrate your industry expertise. Here are some ideas to get you started:

- Why You Should Use a Broker
- Understanding Mortgage Terminology
- Five Top FAQs I Get Asked as a Broker
- What Are My Loan Options for Rental Properties?
- Understanding the Loan Process
- Understanding Refinancing
- How is my rate calculated?
- Fixed Rates versus Adjustable Rates
- How to Improve Your Credit Score
- Dos and Don'ts of the Mortgage Industry
- Questions to Ask When Applying for a Mortgage
- Understanding Closing Costs
- How Much Money You Should Put Down
- Ways to Improve Your Cash Flow
- Mortgage Myths Debunked





## How to Put Together a Blog Post

To keep your blog posts engaging and to optimize them to perform well on Google, be sure your blog posts include:

### A Clear and Concise Headline

Appeal to search engines (Google) and people with a straightforward headline that gives your audience a clear picture of what you are writing about.

### A Keyword URL

Careful with this one! You don't want to be too keyword heavy but having a keyword in the URL is critical for search engines to follow.

### Section Headers

43% of readers skim blog posts. Make your blog post easy-to-follow and let readers jump to the section that particularly interests them.

### Call-to-Action (CTA)

Keep your audience engaged and offer them a next step with a call-to-action button. It could be "Contact Me" or "Call Us." It could also be an action to keep them engaged with your site.

### Share Buttons

Make it easy for readers to share your blog post by including share buttons. One click, and they can share your article on all social platforms or even email out the post.

### Relevant Links

Your blog is a golden opportunity to link elsewhere on your site or even industry leader sites. However, never link just to get more links. Link with a purpose. For instance, link to your form submission or FAQ page on your website.

### Appealing Image

Impact notes that blogs with images get 94% more views! You should always include images with your post, yet be very careful of copyright laws.

## Other Forms of Content Marketing

*Link: 10 FAQ's Mortgage Brokers Should Have on their Website*

Unique content doesn't just have to come from a blog. Here are some other forms of content marketing:



### Website and Landing Pages

Have your own online real estate to capture potential borrowers and provide resources to your current clients. Not only is a website your low-cost 24/7 customer service rep, but it also helps establish credibility. *Link: 3 Must Have Website Pages for Brokers*

### Image Generating Platforms

Want to make your own images, infographics, flyers, etc.? Believe it or not, it's easy and free. Here are two platforms we like with ample templates to help you stay branded and original. Plus, you won't have to worry about using images without permission. *Link: Where to Find Free Stock Images*

#### Canva

**What it's best for:** Presentations, social posts and graphics, flyers, one-pagers

**Why we like it:** Canva is extremely user-friendly with access to over 8,000 templates and millions of free photos. Plus, it gives you the exact size you need for each kind of graphic.

#### Easel.ly

**What it's best for:** Infographics

**Why we like it:** In addition to ample free templates, Easel.ly has all the elements you could possibly need to create any kind of infographic from scratch.

# White Label Materials



The Visio Lending marketing team has generated these program flyers to help you close more loans. Utilize the following flyers to target your borrowers and educate them about how our loan programs are designed to fit the needs of savvy real estate investors.

***Download: Rental360 Single Asset White Label***

***Download: Rental360 Portfolio Plus White Label***

***Download: 5 Year I/O Program White Label***

***Download: Vacation Loan Program White Label***

***Download: Consolidated Loan Programs White Label***

Simply add your contact information and logo in the editable text box. Once you have done that, save the flyer as a PDF file and start attaching it to your email blasts, post it to your LinkedIn as you see fit and consider even having some on hand if you meet face to face with clients.



Find more Broker Resources at:  
[visiolending.com/broker-and-partner-resources](https://visiolending.com/broker-and-partner-resources)