

SOCIAL MEDIA HANDBOOK

Loan Officer's Guide for Social
Media Marketing





**SOCIAL
MEDIA**

**SOCIAL MEDIA MARKETING CAN HAVE A HUGE
IMPACT ON YOUR MORTGAGE BUSINESS'
BOTTOM LINE.**

It allows you to stay in touch with people where they are – and where they are, every, single day, is on social media.

So join the social revolution and find new ways to monetize your business, while turning followers into clients!

PLATFORMS

BEST PRACTICES

ENGAGEMENT

**BUILD AUDIENCE
PARTICIPATION**

CONNECT WITH APM



SOCIAL MEDIA

PLATFORMS

The number of social media platforms can be overwhelming, especially when you have to determine the best way to leverage each one. This can become especially challenging as some platforms rely on photos, others emphasize videos, and another segment does better with plain text and abbreviated links.

Fortunately, you're in the right spot. Here's the rundown on how you can best utilize these social media platforms for the mortgage industry

FACEBOOK



HOW TO USE FACEBOOK

Facebook allows you to post videos and photos, converse with people through messages and comments, and more. Facebook business pages also let you collect reviews on business pages and run ads.



CURATE REVIEWS

Facebook is an easy place for people to leave reviews, and they have a lot of street cred, too. Be sure to thank them!



DIVERSIFY CONTENT

Don't post about mortgages all the time. Give a behind-the-scenes look at your office and life once in a while.



POST VIDEOS

Posting videos directly instead of sharing is more work, but the algorithm highly prioritizes content posted directly.



GO LIVE

Create a Facebook Live, or a livestream video, on an important topic so people can interact with you in real time.



ENGAGE

Share posts to your personal page occasionally and remember to tag people and businesses when possible!



CHECK YOUR INBOX

Leads can come in via Messenger, but you have to be quick in your responses or they'll move on.



CREATE

Create a separate business account so you can see and track your analytics.



SHARE CONTENT

Highlight other local businesses to increase your reach and foster community & good will.



TELL A STORY

Use stories to share fun, behind-the-scenes stuff from your work and home life.



HASHTAG AWAY

Use up to 30 hashtags per post, but be sure they're relevant. If it feels too much put them in the comments.



LINK IT UP

Set up a Linktree account for all your links. Remember links aren't clickable except in bio so this will help!



STAY NATURAL

Natural images that are eye-catching get better engagement than staged photos or branded graphics.

INSTAGRAM

HOW TO USE FACEBOOK

Instagram is all about the image or video, and the way content looks is really important. That said, authentic content tends to perform better than highly branded graphics. You can also do IG video stories in 15-second snippets, or longer IGTV videos of more than 60 seconds



LINKEDIN

HOW TO USE FACEBOOK

LinkedIn is for making and cultivating professional connections. It's more common to connect with someone on LinkedIn even if you haven't met them IRL (in real life). Because this is a professional network, it's important to keep your content focused around the mortgage industry and other parallel topics that are relevant to your LinkedIn audience.



CONNECT

Connect with people in your industry on a regular basis -include all housing and real estate related fields to build your network.



PUBLISH

Write articles and share them on LinkedIn's publishing platform to build credibility.



CUSTOMIZE

Be sure to tailor your content to your audience - some will be customers but many will be industry insiders.



HOW TO USE

Use similar to Facebook, but with a concentration on industry-related information



ENGAGE

Interact with others in your industry by joining convos on LinkedIn Groups.



LISTEN

Listen to what questions or hurdles others are talking about and engage with assistance.



GIVE IT AWAY

Offer freebies in your videos for viewers. An eBook, a checklist or other resource gets them to your site quickly.



BUILD

Build playlists for the different types of videos you post (product, market, first time buyers, etc).



SPELL IT OUT

Add subtitles to all videos. There are several ways to do this automatically in the platform.



ENCOURAGE

Add end cards or text encouraging people to subscribe to your channel.



OPTIMIZE

Research the relevant keywords people are looking for and use them in your video descriptions and tags.



LINK

Include relevant links to your website and social platforms, as well as linking the next video you want the viewer to watch.

YOUTUBE

HOW TO USE FACEBOOK

YouTube allows you to post videos and playlists. Using the power of SEO, videos can have a pretty long shelf life, so quality is important, and your content has to be valuable.





TIKTOK

This video-sharing app is perfect for talking about mortgages – in fact, personal finance videos are a really popular TikTok category.

Tips for Using TikTok

- Post around 4 videos a week.
- Provide genuinely helpful information in 60 seconds or less.
- Be strategic about hashtags – they're critical for getting your content seen.
- Tell a story with your content and use plenty of text overlays.
- Link to your other social media platforms in your profile.
- Don't share only mortgage content—share family or pet content, too.
- Have fun creating content, and don't be afraid to be a little silly!



SNAPCHAT

Snapchat allows you to post photos and videos of up to 10 seconds, complete with text, stickers, emojis and more. You can send Snaps to contacts, make them available to your contacts for 24 hours in your stories.

Tips for Using Snapchat

- Add URLs as links to your Snaps, encouraging people to take action.
- Use geofilters to show your content to users in your location, especially at networking events.
- Create a branded geofilter to build your brand presence.
- Use Snapchat to reach out to potential customers, build engagement and create relationships.

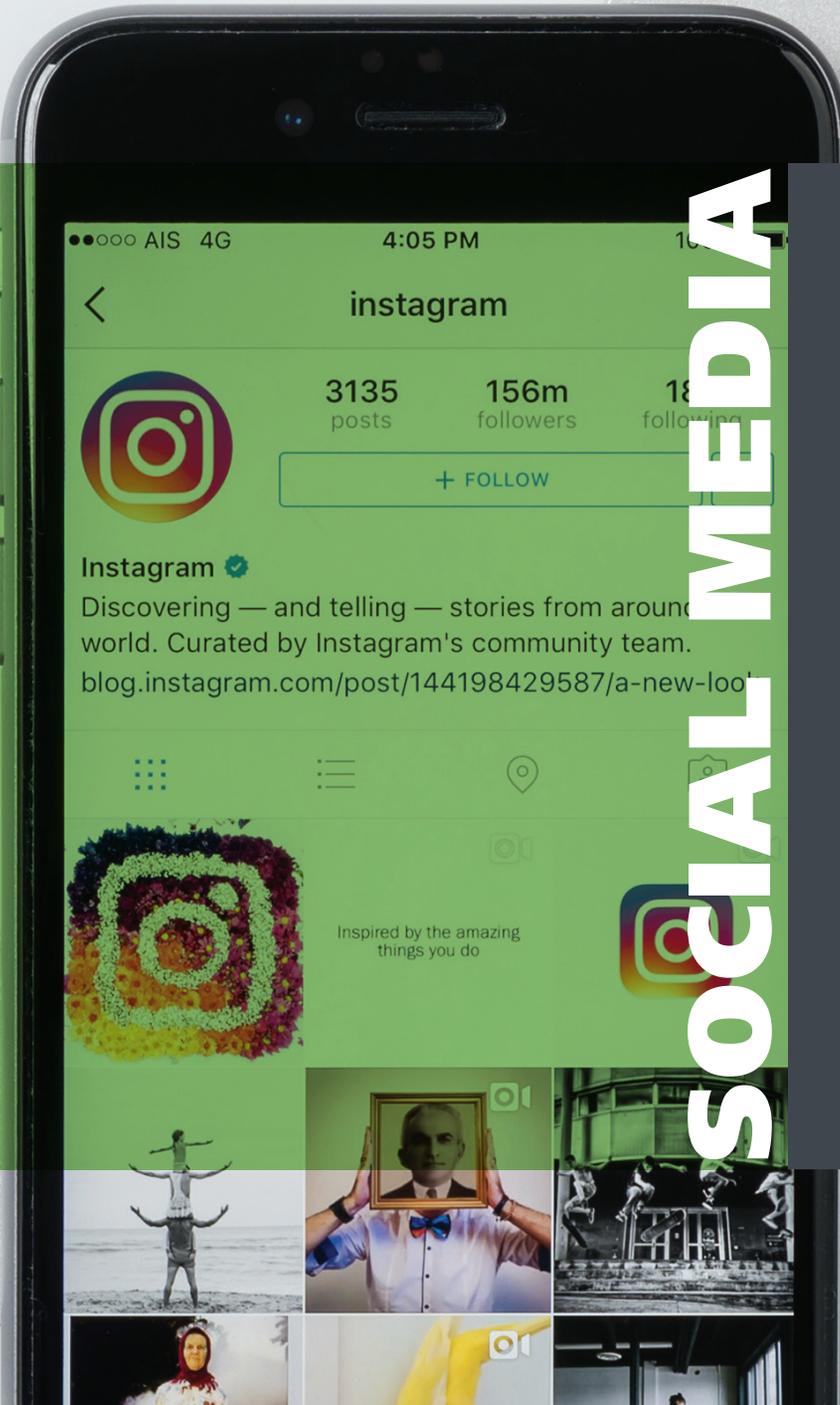


PINTREST

Pinterest allows you to post keyword-rich photos, videos and ideas, linking back to your website or anywhere else you want to send people.

Tips for Using Pinterest

- Target people who have already shown interest in your pins.
- Attract people with useful content including infographics, DIY and homebuying tips.
- Share information about schools, neighborhoods and service providers to position yourself as a local expert.
- Funnel traffic to your blog or website to create leads from your pins.
- Use keywords throughout your profile, board titles, and pin descriptions for SEO traffic.
- Re-pin content regularly to keep it in front of people.



SOCIAL MEDIA

BEST PRACTICES

Knowing the available platforms and what they do is a start, but implementing some best practices will help boost your social media presence, and make your channels more effective.

BEST PRACTICES

Follow your audience back – and be sure to comment on and like posts regularly. Send messages here and there. Follow topics related to home ownership or home finance, and comment on those as well. Invite people to like your page. Wish followers a happy birthday or call out the anniversary of the day they bought their home.



BE CONSISTENT

The most important thing to remember about mortgage posts on social media is that consistency is key. If you post every day for a month and then don't post for six months, you're not going to see nearly as many benefits as you would if you'd simply posted every other day for six months straight.

Your followers expect to hear from you on a regular basis. The whole point of social media is to be social and create authentic connections! So, stay in touch with people, let them know you're here and that you're still their go-to loan officer.

HAVE A PLAN

It's much easier to be consistent with social media marketing if you have a plan! Create a content calendar at least a month in advance. This saves you time and makes it much more likely that you'll post—no more sitting down at 8 p.m. and wondering what you've done that day that you can post about.

We also suggest jotting down any events, meetings or closings that might make good posts and setting a quick reminder to take a picture during that time. Whether you're eating lunch with a real estate agent, closing on a home for a veteran, helping out at the local food bank, or going to a mortgage conference across the country, you'll already know what you're going to post and will remember to do it. Without a plan, it's likely that many of these prime posting opportunities will pass you by.

BULK SCHEDULE POSTS

A bulk social media scheduler lets you schedule as much content in advance as possible. This way, you'll still have content going out when you don't have time to worry about posting.

There are many top-notch schedulers, including APM's internal CRM, Total Expert, that allows you to choose from a library of content that's ready to go.

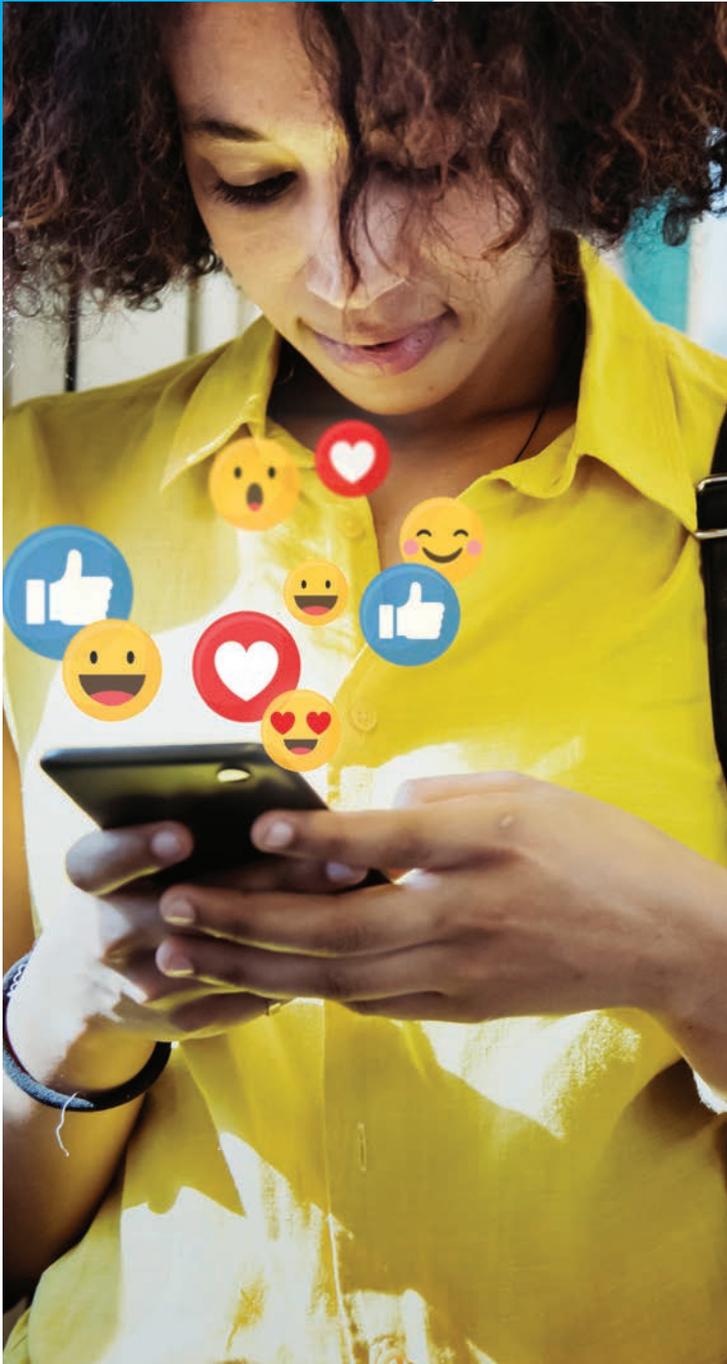
A scheduler lets you easily duplicate posts for different platforms, meaning you don't have to worry about logging into each account every time you want to post. Schedulers also make it easy to monitor your comments, and some allow you to respond right through their platform.



SOCIAL MEDIA

ENGAGEMENT

Social media is all about interacting with people in an authentic, personal way. For your social media accounts to do your business any good, you need to interact with people on a regular basis. That's how they begin to KNOW, LIKE and TRUST YOU.



ENGAGE WITH YOUR FOLLOWERS

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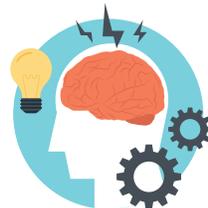
RESPOND TO MESSAGES

The quicker you respond to social media messages, the better. Shoot for under 12 hours, if possible. We recommend installing the Facebook Pages app, which will alert you to messages on your business page and make it easy to respond quickly right from your phone.



FOLLOW YOUR AUDIENCE

Be sure to comment on and like posts regularly. Send messages here and there. Follow topics related to home ownership or home finance, and comment on those as well. Invite people to like your page. Wish followers a happy birthday or call out the anniversary of the day they bought their home.



KNOW YOUR AUDIENCE

It pays to know who your audience is, along with their likes and dislikes. If many of your followers are renters, your content should reflect information that's helpful to first-time homebuyers. You want to be their go-to, approachable expert for all thing mortgages.



VARY YOUR CONTENT

Share a variety of content your audience will find interesting. We suggest breaking your content roughly into thirds.

- Personal—hobbies, celebrations, positive personal news
- Business—milestones, new products, awards, testimonials
- Industry—tips, mortgage news, trends data, market updates



SOCIAL MEDIA

BUILD AUDIENCE PARTICIPATION

The more you can increase audience participation, the better your social media posts will do. You want to do everything you can increase organic engagement on your posts, even if you're going to run ads to them. There are a few key ways to do this



ASK QUESTIONS

People love to share their opinions on all kinds of topics. Ask followers for their input on questions. When they give it, be sure to respond with a quick comment.



TAG PEOPLE

When you tag someone, suddenly all of their friends can see the post, too. It's a free way to dramatically increase the reach of your posts. If you have a closing, ask the clients to post the photo and tag you in it.



TAG LOCATIONS

Tagging your location is another good way to increase engagement on a post, putting it in front of more people.



HASHTAGS

Relevant hashtags are especially important on Instagram. You can use up to 30 to allow as many people as possible to see your posts. On Facebook and Twitter, three to five hashtags per post is usually adequate.

UTILIZE FACEBOOK AND INSTAGRAM ADS

Facebook and Instagram ads can help increase your posts' reach and build your brand. They're a key part of any social media marketing strategy because Facebook is, at its core, an advertising company. You have to pay to play. Business pages have slowly been seeing ever-decreasing organic traffic, but a modest ad budget can really help solve that problem.



SOCIAL MEDIA

CONNECT WITH APM

If you're like most loan officers, you know you should be active on social media, since that's where so many past, current and potential future clients spend their time.

APM has tools, support systems and ready-made content to help you engage without creating a time suck.

MONTHLY CONTENT CALENDAR



A new monthly content calendar makes it easy for you to pick what you'd like to post and get it scheduled. Even better, it coordinates with APM blogs and social media assets.

You will also receive a monthly list that contains all the links to our blogs and APM-branded videos for that month's content. With this document, it's easy to get a month's worth of content knocked out.

SOCIAL MEDIA POSTS



Grab plug-and-play social media graphics, videos and accompanying text in multiple sizes for any platform.

These include:

Loan product graphics

Product videos

Homebuyer education

Engagement graphics

Holiday graphics

Motivational graphics

Infographics

Economic updates

VIDEO SCRIPTS



Video is so important in today's social media landscape, but it can also feel intimidating for many loan officers. One of the hardest things can be knowing exactly what to talk about. With APM, you'll have access to our video script library – scripts that are perfect for doing either a pre-recorded video or for going live on social media.

SOCIAL MEDIA TRAINING



Another APM social media value prop is our regular social media trainings. We know you don't have a lot of extra time to research the ins and outs of all of these platforms, so we do it for you.

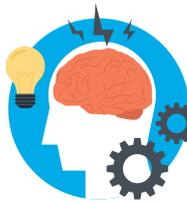
There are also dozens of training videos available to you in the archives.

SCHEDULING YOUR POSTS



The best part is there are new posts for you to choose from every month! You can either download them right from the CRM or schedule them in the CRM by connecting your accounts. It literally couldn't be easier to schedule social media content.

ONE-ON-ONE SUPPORT



Did you know that new APM loan officers receive one-on-one training to ensure they're up to speed on how to best utilize our tools? Whether you need a little support or a lot, our team is here to make sure you have what you need. Branch-level trainings are also offered on specific topics.

CONTENT THAT'S (ALMOST) AS GOOD AS DONE



We've worked hard to make it easy for you to put out your own content with very little work from you and your team. Here's some of what's available for loan officers.

HELP WITH CURRENT PAGES



Our social media specialists are always happy to look at your current social media pages and confirm that they're compliant. They also provide personalized suggestions and tips for better utilizing your social media pages. There's nothing like a little customized advice from the experts!



Ready for more information?

If you're considering making a move, we invite you to click the link below and connect with APM Recruiting to learn more about our unrivaled company culture, superior technology stack, specialty loan products and programs, unique business models, marketing tools and what we call the APM difference.



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