THE ULTIMATE MORTGAGE BROKER MARKETING PLAN 2.0 | THE 7 KEYS TO PREDICTABLE AND PROFITABLE GROWTH

START HERE

1. SET YOUR STRATEGY

1.1 ARTICULATE YOUR VALUE PROPOSITION
- Define your Ideal Client
- Create multiple Ideal Client Personas
- List the specific Problems you solve
- List the specific Results you deliver
- Divide your benefits into two columns:
  (1) Price-of-entry benefits
  (2) Differentiated benefits KEY!
- Gather as much Proof as you can
- Craft a Unique Value Proposition (UVP) Statement
- Create a short tagline
- Create a specific guarantee
- List the triggers that motivate prospects to seek you out.
- Express your UVP in your business name

Code Preview
- Add Google Tag Manager
- Add Google Analytics
- Add Google Remarketing code
- RankMach SEO Plugin

1.2 STRATEGISE PREMIUM CONTENT
Above The Funnel Content:
- Convert "Trigger" questions into content
- Solve client Problems with your content
- Convert client Results into

Top Of Funnel Offers (TOFO):
- Put everything you know on one sheet of paper (like this)
- Solve the problem - don't hold back
- Give maximum value in minimum time

Middle Of Funnel Offers (MOFO):
- Publish a book / webinar / info-product

Bottom Of Funnel Offers (BOFO):
- Offer a Finance Strategy Session
- Offer a valuable consultation
- Provide tangible value, even if they don't proceed

- Add Facebook Pixel
- Set up Conversion Goals
- Create Facebook Custom Audiences
- WP Rocket For Site Speed

1.3 BUILD YOUR EXECUTION PLAN
- Don't over-commit! Do what you do, well. Put timelines against activities. e.g.
- 1-5x per week:
  - Paid search optimisation
  - Publish social media updates
  - Respond to social media comments
- Daily/Weekly/Fortnightly/Monthly (pick 1):
  - Publish a blog / podcast / video
  - Email to list
- Weekly
  - Report on Lead and Lag Metrics
- Monthly
  - Review high-level results and trends
- Quarterly
  - Plan your next 90 days
- Annually
  - Review & revisit your entire strategy

- Add Phone Call Tracking (e.g. CallRail)
- Add Split Testing Code (e.g. Optimize)
- Add Heatmap Code (e.g. Hotjar)

2. DRIVE TRAFFIC

2.1 DRIVE FREE TRAFFIC
- Do keyword research to map keyword:
  (1) Volume (2) Intent (3) Competition
- Build a 5 x 5 x 5 Topic Wheel:
  - 5 Major Topics
  - Each With 5 Subtopics
  - Each With 5 Sub-sub-topics
- Quality is key: no "thin" posts!
- Optimise every post:
  - Use proven headline formulas
  - Use H1, H2, H3 heading tags
  - Add visual & multi-media content
  - Optimise for SEO: (<title>, meta description, keyword in first para, URL post slug, alt img text, headings, internal & external links
- Install the RankMath plugin
- Optimise Page Speed
- Build links
- Use tools (SEMrush, AHREFS, Moz)

2.2 INVEST IN PAID TRAFFIC
Google Ads (Formerly AdWords)
- Separate campaigns by targeting
- Focused adgroup structure
- Get keyword match types right
- Add negative keywords
- Test a minimum of 2 ads per adgroup
- Ensure conversion tracking is set up
- Use ad extensions
- Optimise Quality Score

Facebook Advertising
- Create Custom Audiences:
  - All site visitors (1d, 7d, 14, 30d, 180d)
  - All converters (TOFO, BOFO)
  - Visitors to "money pages"
- Expand with Lookalike Audiences
- Copy & Images: make all elements sell
- Split test ads, offers, landing pages
- Test rich content & video ad creative
- Use "Post ID" to recycle social proof
- Test TlkTok ads

2.3 LEVERAGE SOCIAL MEDIA
- Add a sharing plugin (e.g. Social Warfare)
- Register your brand across social sites
- "The Big 6" - not all are required!
  - Facebook
  - Instagram
  - LinkedIn
  - Tiktok
  - Twitter
  - YouTube
- A few done well beat many done badly
- Use Facebook's Meta Business Suite to respond to comments
- Use apps to schedule social content (e.g. MeetEdgar, Buffer, Co-Schedule)
- Repurpose, repost and recycle content
- Get users from social media to your website, not the other way around
- Not actively pursuing organic social media is OK!
- Install the Google Reviews Plugin

7. REVIEW AND OPTIMISE

7.1 REVIEW YOUR NUMBERS
Review Results against goals:
- Traffic
- Opt ins (list growth)
- Leads & Appointments Sales
- Revenue and Profit

Review Activity against goals:
- Social media publishing
- Blog and email marketing schedule
- Podcasts / videos produced
- Biggest Wins & Biggest Fails
- Customer & Team Feedback
- CELEBRATE THE WINS!

7.2 PINPOINT GROWTH LEVERS
- Remember the 80/20 Rule
Scaling The Winners
- Focus on top traffic sources, pages and offers
- Ramp up profitable spend
- What worked best? Do more of it

Tapping Latent Opportunities
- Fix high-traffic pages with high bounce rate
- Add more relevant offers
- Add followup / remarketing sequences
- Drop unproductive activity/channels

Fresh Innovations
- Review recent trends & opportunities
- Brainstorm new products and offers
- Plan new split tests and experiments

7.3 BUILD YOUR NEXT EXECUTION PLAN
Set Goals For The Next 90d
- Focus on 1 or 2 Wildly Important Goals
- Pick no more than 5 execution "rocks"

Plan Your Execution
- Social media content and schedule
- Blog post content and schedule
- Podcast / Video content and schedule
- 1-Off Content (e.g. New Lead Magnets)
- Split test setup / R&D activities

Evaluate Your Growth Team
- Rank each team member A/B/C/D
- Consider targeted training
- Consider adding/removing members

6. REPORT AND MEASURE

6.1 COLLECT, VISUALISE & ANALYSE DATA
Collection / Display Tools:
- Google Analytics
- Facebook Analytics
- Google Ads Reporting
- LiveChat / Intercom / Drift

Qualitative Tools:
- Advanced User Tracking (e.g. FullStory)
- Heatmaps (e.g. CrazyEgg, HotJar)
- Survey Tools (e.g. Survey Gizmo)

Visualisation Tools:
- Dashboards (e.g. Google Data Studio)
- CRM Dashboards (e.g. BrokerEngine)
- Customer Lifecycle Tracking (e.g. WickedReports, KISSmetrics)

6.2 TRACK KEY MARKETING METRICS
- Track both Lead & Lag Measures
Lead Measures (Activities)
- Blog posts published
- Broadcast emails sent
- Links built
- Social posts / interactions
- Pages / offers / campaigns launched

Lag Measures (Outcomes)
- Traffic (Visits, Users)
- Traffic by Source
- Opt Ins
- Leads (Enquiries)
- Appointments Booked
- Campaign reports
- Performance by device

6.3 MONITOR KEY SALES METRICS
Lead Measures (Activities)
- Initial Appointments Held
- 2nd Appointments / Presentations Held
- Follow Up Appointments Held
- Proposals / Quotes sent

Lag Measures (Outcomes)
- 2nd Appointments / Presentations Booked
- Follow Up Appointments Booked
- Sales Won / Reasons Won
- Sales Lost / Reasons Lost
- Settlements by Broker
- Settlements by Source
- Avg Loan Size
- Sales Cycle Time (days)
- Client Acquisition Cost (CAC)
- Total Settlement Volume

7 KEYS TO GROWTH
1 SET YOUR STRATEGY
2 DRIVE TRAFFIC
3 CONVERT TRAFFIC
4 NURTURE LEADS
5 CREATE CLIENTS
6 REPORT AND MEASURE
7 REVIEW AND OPTIMISE

Checkout The Latest **BrokerEngine** Software Demo:
BrokerEngine.com.au/demo

3. CONVERT TRAFFIC

3.1 DEPLOY DESIGN THAT CONVERTS
- High-end direct response design pays off
- Put "Problem, Promise, Proof" above the fold
- Enable easy scanning with subheads, boxes, bold, italics, bullets etc.
- Use clear, legible fonts
- Use images that sell
- Use directional cues (e.g. arrows) to direct the eyes
- Be wary of gimmicks (e.g. scrolling images) that don't serve a purpose
- Optimise for usability (Don't make them think!)
- Design for mobile first (and desktop second)

3.2. USE DIRECT-RESPONSE COPY
- Add benefit-rich headlines to every page
- Match your message with visitor intent
- Use "you" 10X more than "I/we"
- Focus on Problems you solve and Results you create
- Use sub-headings to capture "scanners"
- Use punchy bullets and numbered lists
- Re-read copy aloud to ensure it flows
- Use captions to reinforce images
- Ensure every page has a Call To Action
- Focus on one Call To Action at a time
- Add a "next step" to thank you pages
- Long copy beats short, most of the time
- Add microcopy and tooltips to forms
- Add a P.S. Yes, they do get read!

3.3 HARNESS PRINCIPLES OF PERSUASION
- Use "moving towards" and "moving away from" motivation
- Use logic and emotion
- **Top 10 Proof Elements:**
  (1) Testimonials
  (2) Case Studies
  (3) Before & Afters
  (4) Awards & Certifications
  (5) Reasons Why
  (6) 3rd Party Reviews
  (7) Valuable Content
  (8) Origin Story
  (9) Comparisons
  (10) Guarantees
- READ **Influence** by Robert Cialdini

5. CREATE CLIENTS

5.1 MANAGE LEADS EFFECTIVELY
- Leads are the world's most perishable commodity
- The optimal lead response time is under than 5 minutes
- The optimal number of contact attempts is 6
- The best times to reach prospects are 8-9 am and 4-5pm
- Use email, phone and SMS to contact leads
- Make it easy for clients to provide accurate info (e.g. optimise forms).
- Use mobile "input types" to make data entry more accurate on mobile
- Send a book or info pack by post to pre-sell prospects

5.2 REFINE YOUR SALES PROCESS
- Define clear sales process stages
- Qualify leads to avoid wasted sales appointments
- But don't qualify too hard, too soon
- Get sales training for your team
- Use a great sales process every time
- Script out best practices
- BAMFAM: Book a meeting from a meeting
- NEVER email loan recommendations: present options in real time (in person or via screenshare)
- Keep track of your pipeline
- Present loan options with a proven template (e.g. Loan Strategy Report)
- Review sales metrics weekly
- Practice, coach and roleplay

5.3 OPTIMISE YOUR BUSINESS MODEL
- Have a strict client selection criteria
- Ensure smooth onboarding
- Deliver quick wins
- Add additional recurring revenue streams
- Create offerings for your best clients
- Track and monitor processing times
- Ask for testimonials & case studies
- Check in on the relationship periodically
- Clearly communicate value
- Educate your clients ongoing
- Proactively review your portfolio
- Orchestrate referrals

4. NURTURE LEADS

4.1 NURTURE YOUR EMAIL LIST
- Always get permission to email
- Add a drip email **sequence**
- Create a steady broadcast rhythm
- Maximise value (simple idea: link to high value blog posts)
- Use short, benefit-driven subject lines
- Track opens and actions, then follow up based on response / non-response
- Segment and send only relevant info
- Let people opt out of specific campaigns
- Append a SuperSignature:
  - In the P.S.
  - "Whenever you're ready here's how we can help you [achieve result]..."
  - Then add 1 to 4 "standing offers"
  - Plus a Call To Action

4.2 WORK YOUR MARKETING FUNNEL
- Add a "next step" Call To Action to each piece of content
- Add dedicated landing pages for key offers (e.g. especially consultations)
- **Content That Progresses The Sale:**
  (1) Case Studies & Success Stories
  (2) Content Upgrades (e.g. calculators)
  (3) Content that addresses common objections
  (4) Deep insights - reframe problems, solutions and concepts
  (5) Branded Content e.g. "How To [get result] with [your brand]"
  (6) High Content Depth formats (books, webinars, mini-courses)
  (7) Special Offers, Campaigns & Promos

4.3 RETARGET YOUR FUNNEL
- Add Facebook pixel to every page
- Add Google Ads pixel to every page
- Create sequenced offers to:
  - Return users to free content
  - Return users to Lead Magnets
  - Retun users to MOFOs
  - Return users to BOFOs
- Stack offers in a Remarketing Grid e.g.
  - "Did you forget to..."?
  - Try another hook/benefit
  - Try a lower-commitment offer
  - Share proof or success story
  - Neutralise an objection
  - Deadline reminder
- Cross-retarget across platforms (e.g. Organic ↔ Facebook ↔ Google

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