



# The Mortgage Broker Marketing Scorecard™

Identify, prioritise and focus on your next best steps

Name:

Date:

7 Key Areas	21 Growth Levers	1	2	3	4	5	6	7	8	9	10	11	12	TODAY	90 DAYS	
1  Set Your Strategy	1.1 Articulate Your Value Proposition	You have no real understanding of your Ideal Prospect, nor a solid grasp on how you provide superior benefits to your clients compared with other brokers.			You know you provide a good product or service, but you struggle to succinctly articulate your Unique Value Proposition, and just engage with any prospect or client with a pulse.			You have a clear picture of your Ideal Prospect and your major value differentiators, but you're not clear or consistent in articulating that message to clients.			You have articulated a crystal clear Unique Value Proposition that is displayed prominently in all your client facing materials and understood by every member of your practice.					
	1.2 Strategise Premium Content	You don't have any specific content or offers for A) building your email list or B) generating leads and/or sales.			You have generic content and offers (e.g. guides, calculators, etc.), but you don't feel they are differentiated or effective at attracting Ideal Clients.			You have solid premium content and offers, but you struggle to promote and leverage them on a consistent basis in order to reap the rewards.			You have effective premium content offers that generate a steady and consistent flow of new email subscribers and qualified leads or clients each and every week.					
	1.3 Build Your Execution Plan	You have no formal marketing, sales and growth execution plan.			You have a chronic pattern of getting excited about various marketing and growth initiatives, but then spend whole quarters feeling like nothing is moving forward.			You are doing consistent marketing, prospecting or other client attraction, but in a "shoot from the hip" manner that struggles to maintain momentum.			You are consistently creating monthly or quarterly marketing and sales plans including an integrated menu of tactics and strategies for execution.					
2  Drive Traffic	2.1 Drive Free Traffic	You either don't have a website, or your website is generating almost no free organic traffic every month.			You have a website that ranks for non-competitive terms such as your name or your brand, but doesn't bring in any real traffic for non-branded terms (e.g.Sydney Mortgage Broker).			You are engaging in a regular program of content marketing and organic traffic generation, but sometimes doubt if the effort is worth the results you're seeing.			You are executing consistent content marketing, publishing, link-building and other SEO strategies that drive a solid volume of traffic and new client enquiries every month.					
	2.2 Invest in Paid Traffic	You've never spent anything on paid traffic such as Facebook, Instagram, Tik Tok or Google Ads			You have experimented with paid traffic generation in the past, but found it expensive and competitive, and you just couldn't justify the ROI.			You invest in paid traffic on a regular basis and would be happy to invest more if you could find a way to make it more profitable and scalable.			Paid traffic is a key pillar of your growth strategy, generating consistent leads and clients every week on a cost-effective basis.					
	2.3 Leverage Social Media	You don't have any presence on social media for your practice.			You have a token presence on social media, but are fairly dormant in terms of content sharing and audience engagement.			You are active on one or more well-chosen social platforms, sharing content and interacting with prospects and clients on a regular basis.			You are a social media machine, with a well-organised program of content publishing, curation and interaction with fans, prospects and clients.					
3  Convert Traffic	3.1 Deploy Design That Converts	You either have no website (or marketing collateral), or a bog-standard "business card" style website with no conversion power.			You are using a generic, off-the-shelf website provided by your aggregator that is the same as hundreds or thousands of others like it.			You have a professional-looking website, but with no specific focus on conversion-oriented design that motivates prospects to enquire or buy.			You are proud to own a cutting-edge, response-oriented website that is designed from the ground up for credibility, usability and maximum response.					
	3.2 Use Direct Response Copy	You have no website (or marketing collateral), or a website that features basic "name, rank and serial number" sales copy.			Your marketing copy is dull and corporate sounding, designed merely to convey the benefits of using "any" broker as opposed to why they should do business with "you".			Your website copy and marketing collateral is professional and reads well, but could be more successful at driving response from your audience.			You are deploying psychologically compelling direct-response copy that consistently drives an enthusiastic response.					
	3.3 Harness Principles of Persuasion	You're not entirely sure what principles of persuasion are, and are not using them in your marketing.			You are aware of key elements of persuasion such as Reciprocity, Commitment and Consistency, Social Proof, Authority, Liking, and Scarcity, but are not really using them in your marketing or sales interactions.			You use a selection of persuasion strategies on a regular basis, but could be more consistent and comprehensive in their application throughout your business.			You are a persuasion Jedi, deploying a wide-cross section of persuasion principles in your client communications (and always adding more, such as more testimonials).					

4	Nurture Leads	4.1	Nurture Your Email List	You don't keep an email list of prospects or clients (or you never communicate en masse via email).	You sporadically send email bulletins to prospects and clients, but nothing in the way of unique or differentiated content.	You are constantly building your email list, and you do send out communications, although less regularly or consistently than you would like.	Growing a responsive email list and regularly sending out valuable and informative content and offers is an ingrained part of your marketing strategy.		
		4.2	Work Your Marketing Funnel	You don't communicate with prospects and clients in different ways, based on where they are in the client journey.	You do communicate with different segments (e.g. prospects vs clients) in different ways, but this is largely ad hoc as opposed to structured.	You consistently nurture prospects and clients with relevant messaging, but you could be more strategic about the type of content you use in order to motivate action.	You are continuously executing a segmented marketing and communications strategy, featuring specific content and messaging designed to compel action.		
		4.3	Retarget Your Funnel	What's retargeting?	You have retargeting codes or pixels set up on your website, but haven't used them in live campaigns yet.	You conduct retargeting on a regular basis, but are somewhat static or generic in your approach (e.g. showing all website visitors the same ad).	You are using multi-step retargeting as a regular component of your marketing mix, designed to ascend prospects to the next step in your client journey.		
5	Create Clients	5.1	Manage Leads Effectively	You usually respond to enquiries and figure that motivated prospects will email or call again if they're really serious.	You usually respond to leads or enquiries within 1 to 2 business days, and attempt to contact at least a couple of times before giving up.	You almost always call leads on the same business day, and make at least 3 attempts to follow up via email and phone as a minimum.	You call every lead within 5 minutes during business hours, and consistently make 6 contact attempts via a variety of mediums before you declare a lead "uncontactable".		
		5.2	Refine Your Sales Process	You don't have any formal sales process - how you sell to new clients changes from day to day or week to week.	Although you approach each sales conversation in a similar way, you often tend to "wing it" and don't have anything documented for all team members to follow.	You're delivering a consistent sales process that delivers consistent results, although you could increase results through better scripting, documentation and training.	You're highly effective at engaging clients in a formal, documented and managed sales process that delivers a high conversion and decisive action from clients.		
		5.3	Optimise Your Business Model	You just focus on making a sale and hope the rest will take care of itself.	Your business is built around getting new clients and being responsive customers when they need more or ask for help.	You deliver a solid customer journey, but could certainly improve other aspects of your business model such as, pricing strategy, innovation, product lineup and operating model.	You proactively optimise every facet of your business model to ensure the optimal client experience, while delivering high profit margins and growth.		
6	Measure and Report	6.1	Collect, Visualise & Analyse Data	You don't collect or analyse any marketing or sales data to help guide your progress.	While you do collect data from a few basic sources (e.g. Google Analytics), you don't tend to do much with the information you do collect.	You regularly analyse key metrics, but your approach is quite narrow (e.g. quantitative only) and is not shared or discussed with your team.	You regularly collect, analyse and visualise relevant quantitative and qualitative metrics as well as share results and trends with your team.		
		6.2	Track Key Marketing Metrics	You don't track and report on of any key marketing metrics.	You have some inconsistent tracking and reporting in place, but the focus is on Lag measures (e.g. traffic, leads), and is not translated into improvements.	You consistently track and report on key Lead and Lag marketing metrics, but there is often gap translating these into team alignment and improvement initiatives.	You consistently review and report on Lead and Lag marketing metrics in order to benchmark and improve your marketing execution and results.		
		6.3	Monitor Key Sales Metrics	You don't keep track of any key sales metrics.	You tend to look at top line figures (e.g. new customers and sales) but are not drilling down much further.	You do report on a range of Lead and Lag sales metrics, but are not consistently translating what you see into team member feedback and action steps.	You consistently use a range of timely Lead and Lag sales metrics to track your progress and also guide specific priorities, priorities and improvement decisions to grow results.		
7	Review and Optimise	7.1	Review Your Numbers	You don't review any metrics against goals on a regular basis.	You look at metrics on an ad hoc basis - but tend to lose track of your original goals and are lacking real traction.	You review your marketing, sales and growth numbers at least quarterly, but don't typically drill down into root causes so you can improve.	You review all key metrics against goals at least every quarter, analyse the winners and losers, and celebrate the wins!		
		7.2	Pinpoint Growth Levers	You don't have the data you need to zero in on the best improvement opportunities.	You have access to a range of data points, but are not in the habit of translating that into improvement opportunities.	You review your key numbers regularly, but are not always focused on identifying and prioritising the highest-value opportunities.	You consistently review your key numbers, pinpoint the biggest "bang-for-buck" growth levers, and act on them.		
		7.3	Build Your Next Execution Plan	You don't have any regular execution planning cycle.	You tend to start out with grand ideas, but very little gets executed by the due date.	You create marketing and sales plans on a regular basis, and some gets done by the due date, but your execution needs to be tighter.	You are achieving impressive traction and are always parlaying one execution plan into a bigger and more ambitious plan for the period ahead.		

## YOUR SCORE

