

**YOUR**

**2023**

**INTERNET**

**MARKETING PLAN**

**For Mortgage Brokers**



**Mortgage Broker  
Marketing .com** 

SEO | PPC | Web Design | Social

# KEY INSIGHTS AND ACTIONS

<b>GOALS AND TARGETS</b>			
<b>YOUR MARKETING FOUNDATION MARKET - MESSAGE - MEDIA</b>			
<b>WEBSITE CONVERSION OPTIMIZATION</b>			
<b>YOUR 2023 PLAN &amp; BUDGET</b>			

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# THE DIGITAL DOMINANCE METHOD

For the maximum flow of calls, leads & profitability in your Mortgage Business



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# YOUR 2023 INTERNET MARKETING PLAN



**"Success is Goals. All Else is Commentary."**

***-Brian Tracy***

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# GOALS AND BUDGET ALLOCATION WORKSHEET

## What is your goals for 2023?

- What is your revenue target?

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- How much is that monthly?

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- How many calls will that require?

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- What is your average transaction value?

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- What is your lifetime customer value?

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## How Many Leads will you need?

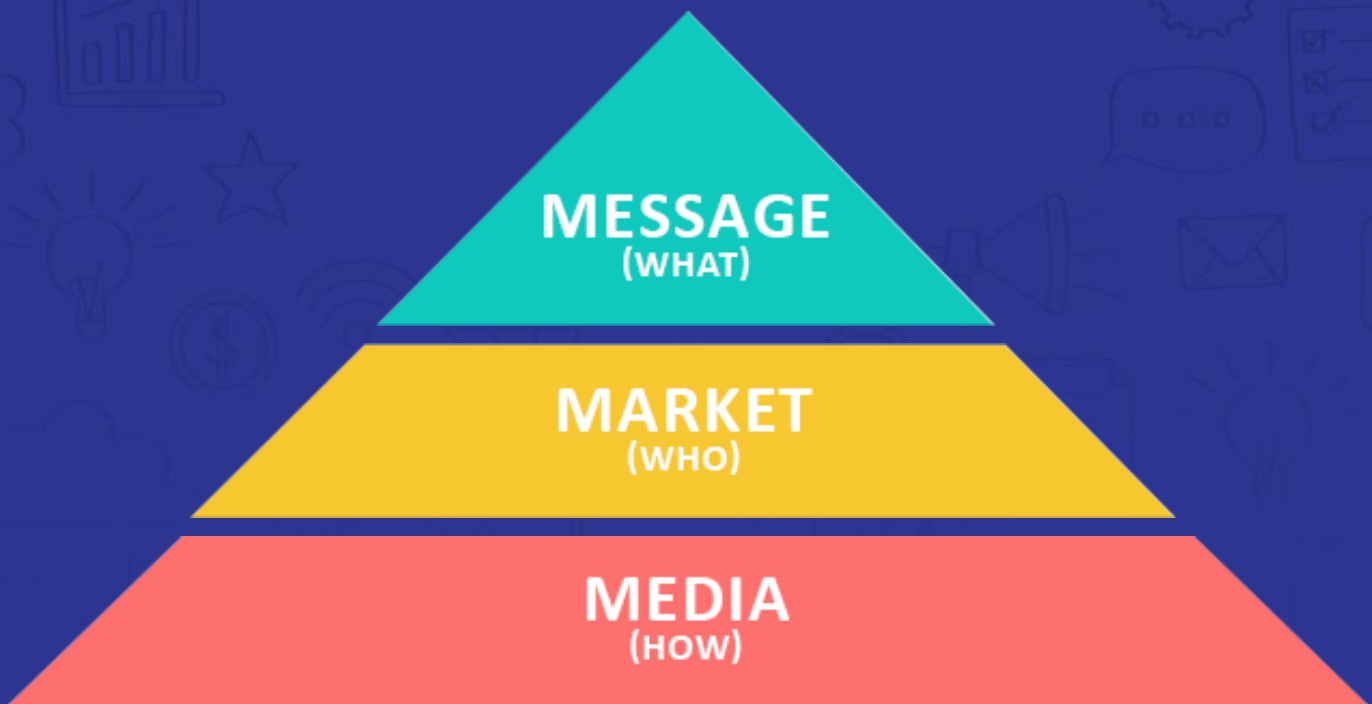
- What is your average conversion rate from caller to closed loan?

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- Multiply your Call Target by your conversion rate

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# The Fundamentals of Your Mortgage Marketing Plan





# Who is your ideal Customer Avatar?

**YOUR AVATAR'S GOALS & FRUSTRATIONS**

Copyright © 2012 The Marketing Mentor

This powerful step will make every aspect of your marketing more effective. Seriously. At the end of the day, your clients' decision to (or not to) take action boils down to their level of pain or desire for pleasure. This exercise addresses both. Which is why it's bad to the bone.

**MARKET RECON**



	AWAY	NOW	TOWARD
<b>PAINS &amp; FRUSTRATIONS</b>			<b>GOALS &amp; DESIRES</b>
<b>FEARS &amp; IMPLICATIONS</b>		<b>EVENTUAL</b>	<b>DREAMS &amp; ASPIRATIONS</b>

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# Who is your ideal Customer Avatar?

## Demographics

- ▶ Home Owner
- ▶ 35+ years old
- ▶ Typically female occasionally male
- ▶ Married with 2-3 kids
- ▶ Head of household
- ▶ \$65K+ Annual Household Income
- ▶ Family oriented
- ▶ Reliable
- ▶ Easily frustrated
- ▶ Likes to please people & expects the same in return
- ▶ Likes gardening, crafting & arts
- ▶ Lives in the suburbs - upper middle class neighborhood
- ▶ Takes an interest in their community

## Pains & Frustrations

- ▶ Underwater
- ▶ Can't get a mortgage company on the phone or to return their call
- ▶ Need to get mortgage question answered
- ▶ Too busy to deal with it

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# Who is your ideal Customer Avatar?

## Fears & Implications

- ▶ Too much debt
- ▶ Don't have enough for down payment
- ▶ Don't make enough money
- ▶ Credit score too low
- ▶ Going through the home-buying process only to get turned down
- ▶ High interest rate
- ▶ Mortgage is higher than rent and having a hard time with rent

## Goals & Desires

- ▶ Getting the mortgage they deserve
- ▶ Having a well kept home
- ▶ Taking care of their family
- ▶ More income, money, wealth
- ▶ Live in a nicer more luxurious home
- ▶ Drive a nicer car
- ▶ Kids healthy, happy & successful
- ▶ Spend more time with family
- ▶ Travel & have fun with family
- ▶ Respect and approval of friends, family and relatives
- ▶ Piece of mind

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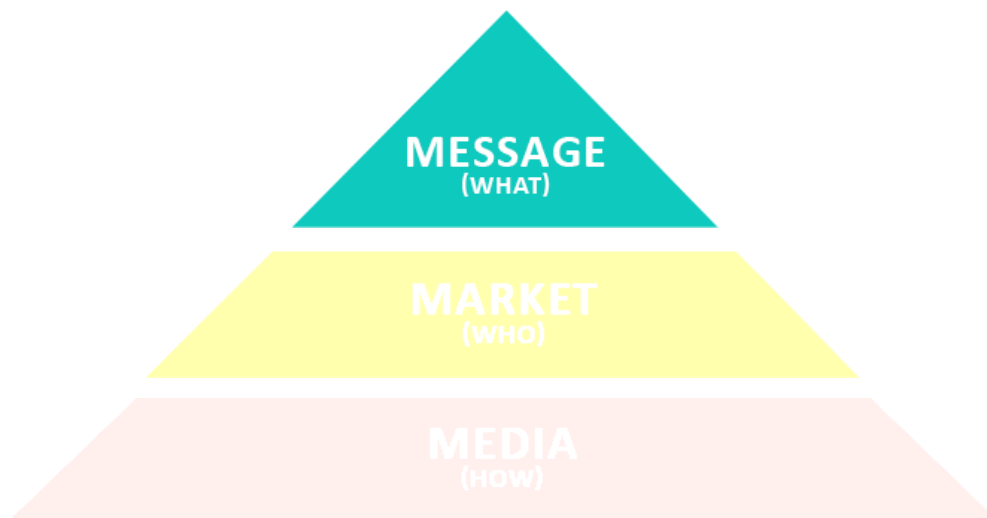
# What is your message?

Why should someone choose to do business with you vs. the competition?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What benefits do you offer that your target customer avatar will resonate with?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



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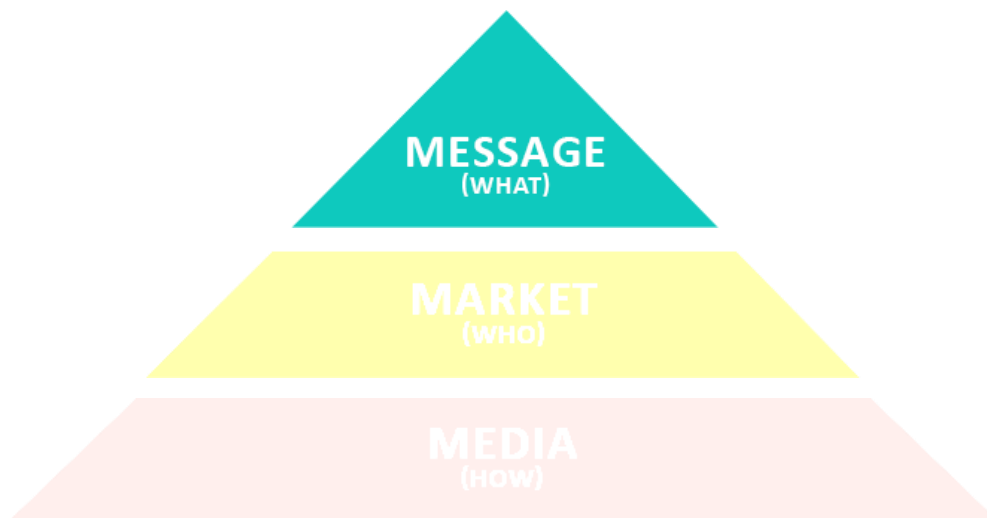
# What is your message?

## Messaging That Works

1. Underwater? Get Refinanced Fast!
2. Got Equity? Get Access To Your Money!
3. Need Help With Down Payment? Call Today!

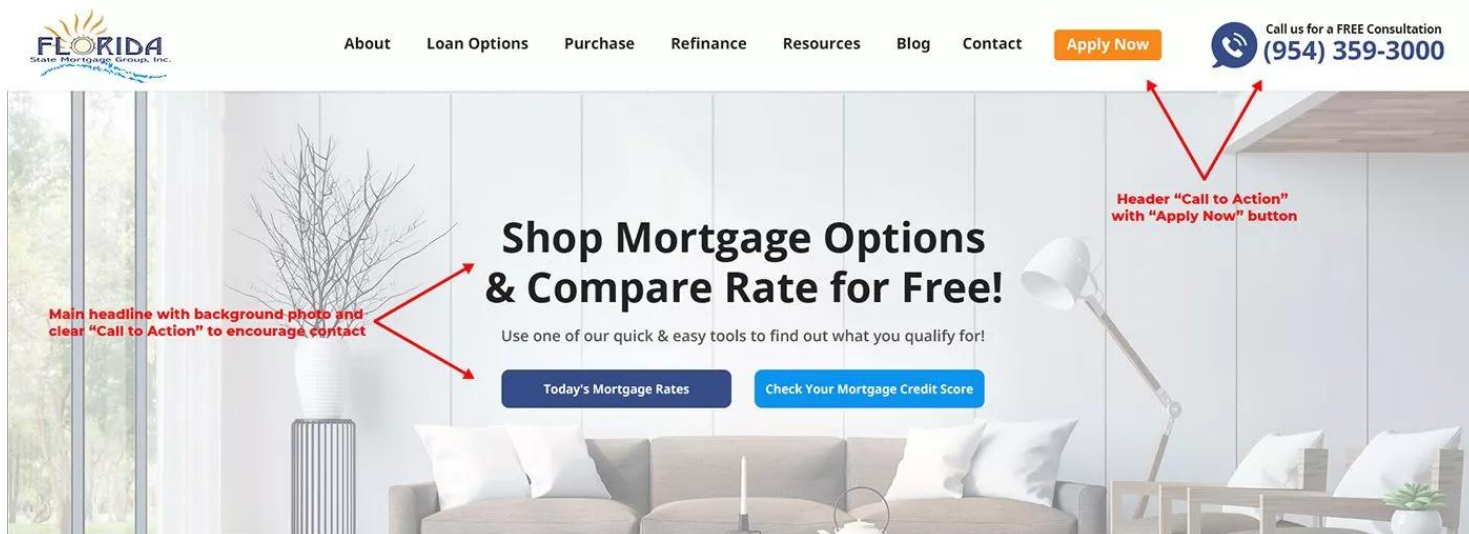
## You can make the case

1. Always Available To Answer Calls
2. Secure Document Handling & Ease of Use
3. Never Resubmit Paperwork



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# Is your website setup to CONVERT visitors to callers?



## Premier Fort Lauderdale Mortgage Broker, Florida State Mortgage Group

Florida State Mortgage Group, Inc. was founded to make mortgage financing convenient. A team of seasoned financial masters came together to provide a comprehensive range of financing options to residents, property owners, maiden investors, developers, and more.

Our customer-centric approach to financing focuses on first-time home buyers and US Veterans. Whether you're in search of refinancing an outstanding loan or want to purchase your abode in sunny Fort Lauderdale and other parts of Florida, we come together to make your dreams a reality.

## Experience the Difference

We put a special emphasis on **first-time home buyers** and **US Veterans**. This makes navigating the real estate market and mortgage financing in Florida much easier. We provide specialized programs for these categories. These include down payment assistance funds and **Mortgage Credit Certificates (MCC)** programs among others.

We maintain a fast turnaround on applications and utilize online tools at hand to make the process go faster in a streamlined manner. Additionally, we pay close attention to your needs, answering queries and assisting in completing and submitting applications.



Authentic Photo to infuse personality into your website

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# Is your website setup to CONVERT visitors to callers?



## Loan Options

We offer a variety of loan programs to help you accomplish your housing goals.

Incredible content about your loan programs & links to each individual loan program

### Conventional Loans

Prime loans that are offered in compliance with regulations set by Freddie Mac and Fannie May.

[LEARN MORE](#)

### Jumbo Loans

With stringent eligibility criteria, jumbo loans accommodate larger mortgage options.

[LEARN MORE](#)

### FHA Loans

Federal Housing Administration or FHA-backed loans allow homeowners to materialize their dream home.

[LEARN MORE](#)

### VA Mortgage

VA mortgage loans can be availed by proud military service individuals and their spouses, with without no an upfront payment.

[LEARN MORE](#)

### Condo Loans

Both full-review and limited-review condo loans are available with as little as 3% downpayment.

[LEARN MORE](#)

### Self-Employed Mortgage

Prime financing options for all the entrepreneurs in Fort Lauderdale and adjoining areas issued over proven eligibility.

[LEARN MORE](#)

### Home Purchase Loans

Home purchase loans for first-time homebuyers, allowing you to get your hands on your new home as soon as possible.

[LEARN MORE](#)

### Florida Mortgage Credit Certificate

A Florida MCC in Fort Lauderdale allows first-time home buyers and US Veterans to finance their home.

[LEARN MORE](#)

### Mortgage Refinance

Refinance outstanding mortgage with practical financing solutions available on your application's merit.

[LEARN MORE](#)

## Why Choose Florida State Mortgage Group, Inc.



Quickest possible application to close. Close in days not weeks or worse, months.



First time and US veteran purchase assistance programs including downpayment assistance and recurring tax credit programs.



Non-bureaucratic application process. Deal with decision makers.

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# Is your website setup to CONVERT visitors to callers?

## What Our Clients Are Saying

Florida State Mortgage Group, Inc.

powered by Google  
★★★★★

Customer Testimonials Section



Scott Yankton

★★★★★

The smartest, most helpful and insightful mortgage loan person I've ever used. On our first attempt to buy he saved us from disaster. On our second attempt he was finished and ready to close before everyone else! Our loan was a VA so we expected it to take extra time...nope. For our next loan we won't use anyone else.



Sean Zamora

★★★★★

Steve McWilliam was a tremendous help in securing my mortgage a few years ago. He's also been a great source of knowledge in the time since. I highly recommend him as someone you can trust.



Jennifer Cane

★★★★★

They actually made obtaining my home loan fun and enjoyable on my part. The process was painless at all I expected it to be. They explained the process well to new buyers (like us) and at the same time keep me in the loop the entire time during the process. They really helped the process go smoothly... [Read more](#)



Hugh Bruder

★★★★★

If your looking for a highly professional, easy to work with and lightning fast mortgage team, then Florida State Mortgage is for you. I wouldn't go anywhere else for my mortgage needs.



Tim Hagley

★★★★★

I'm so happy that we chose Florida State Mortgage Group for our new home loan needs. They were very professional and honest about some hurdles we needed to get through first to get a best deal. I thought that process was long and hard, but it was not. They made it smooth, prompt and easy they guided us on every step... [Read more](#)

Need us to help improve your credit score in order to secure  
a lower interest rate?

Call us today at **954-359-3000** and experience the difference.

**FREE Mortgage Rate Quote!**

Please "Click to Submit" to encourage visitors to contact you.

Address & Local  
Schema Markup

### QUICK LINKS

About  
Purchase  
Refinance  
Resources  
Blog  
Apply Now

### LOAN OPTIONS

VA  
FHA  
Conventional  
Jumbo  
First Time Home Buyers  
Self Employed  
Condominium Mortgages  
Mortgage Credit Certificate

### CONTACT

Fort Lauderdale  
1512 E Broward Blvd, #204A,  
Fort Lauderdale, FL 33301  
Phone 954-359-3000  
Fax 954-449-0283  
NMLS# 393326

### CONNECT WITH US



Social Media Integration



Florida State Mortgage Group, Inc. is an Equal Housing Lender. As prohibited by federal law, we do not engage in business practices that discriminate on the basis of race, color, religion, national origin, sex, marital status, age, because all or part of your income may be derived from any public assistance program, or because you have, in good faith, exercised any right under the Consumer Credit Protection Act. Disclaimer: Programs subject to change without notice. All borrowers must qualify per program guidelines.

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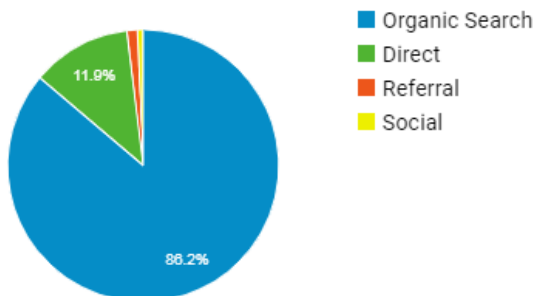


# Is your website setup to CONVERT visitors to callers?

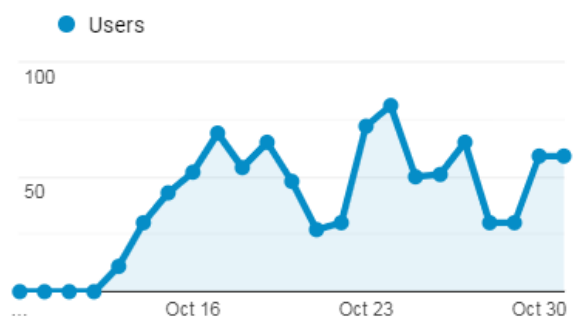
- ✈ Does it speak to your target avatar? Does it address their fears and frustrations & speak to why they should choose you?
- ✈ Does it have real authentic images of your team to the homepage & throughout the website
- ✈ Does it include video elements to your website
  - o Website welcome video
  - o Video's for loan programs and their benefits
  - o Video explaining why someone should contact you vs. the competition
- ✈ Does it showcase your online reviews more prominently on the home page with a tool like BirdEye or ReviewBuzz?
- ✈ Does it make it easy for them to take action and get in contact with your company?
- ✈ Get the basics in order
  - o Phone number in to right hand corner
  - o Ensure that there is a web form that customers can fill out
  - o Add credibility with Authority Symbols (BBB, Yelp, etc)
- ✈ Update the Calls To Action on each page to ensure you speak to your customer Avatar & tell them exactly what to do next.

# DO YOU HAVE KPI TRACKING IN PLACE?

Top Channels



Users



Funnel URL

Q&A Vers

grandviewlendinginczuvhc.secure-clix.com   STICKY BAR Conventional Purchase					
VIEW	EDIT	LEAD ALERTS	STATS	MY LEADS	STATUS CLONE
New Leads	Total Leads	Visitors Since Sunday	Visitors This Month	Total Visitors	Conversion Rate
97	98	37	128	1460	6.71%

grandviewlendinginc.secure-clix.com   STICKY BAR Conventional Refinance					
VIEW	EDIT	LEAD ALERTS	STATS	MY LEADS	STATUS CLONE
New Leads	Total Leads	Visitors Since Sunday	Visitors This Month	Total Visitors	Conversion Rate
20	22	28	105	1896	1.16%

grandviewlendingincdmoqx.secure-clix.com   STICKY BAR Conventional Hybrid					
VIEW	EDIT	LEAD ALERTS	STATS	MY LEADS	STATUS CLONE
New Leads	Total Leads	Visitors Since Sunday	Visitors This Month	Total Visitors	Conversion Rate
11	11	13	66	489	2.25%

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# The **2023** INTERNET MARKETING CHECKLIST For MORTGAGE BROKERS

How To Win Online & **Maximize** Your Lead Flow Via Internet

## ☐ Is your website optimized for conversion (visitor to caller)?

- ☐ Do you have the phone number in the top right corner on every page?
- ☐ Are you using authentic images / videos / photos of the owner, photo of your team, etc?
- ☐ Do you have a compelling Call to Action after every block of text?
- ☐ Are you giving customers the option to engage via chat or 2-way text?
- ☐ Is your website mobile friendly with an easy click-to-call button?
- ☐ Is your website fast loading on desktop & mobile?

## ☐ Is your website optimized for search engine rankings?

- ☐ Do you have your main keyword in the Title Tag on every page of your website? e.g. City Mortgage Broker | Your Company Name
- ☐ Do you have pages for each of your core services?
- ☐ Do you have pages for each of the sub-cities that you service?
- ☐ Do you have unique content on every page of your website?
- ☐ Does your website rank on page one of your most important keywords like "Your City Mortgage Broker", "Your City Mortgage" other similar keywords?
- ☐ Are you consistently creating new content, blogging and creating new inbound links back to your website?

## ☐ Is your company optimized to rank on Google Maps?

- ☐ Have you claimed & verified your Google My Business listing? Do you have the login?
- ☐ Have you properly optimized your Google My Business listing?
- ☐ Are you on all the major online directory listings with the same company name, address & phone number? (consistent NAP)
- ☐ How many online reviews do you have?
- ☐ Do you have a proactive strategy for getting new online reviews every day?
- ☐ Are you posting to Google My Business weekly & responding to questions?



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# The **2023** INTERNET MARKETING CHECKLIST For MORTGAGE BROKERS

How To Win Online & **Maximize** Your Lead Flow Via Internet

## ■ Are you taking advantage of paid online marketing?

- Are you running retargeting ads to your unconverted leads?
- Are you running Google Ads?
- Are you strategically targeting with specific ad groups, text ads & landing pages?
- Do you have conversion tracking in place to track leads back to the ad group/keyword?
- Are you listed on all of the paid online directories?

## ■ Are you running Social Media Ads?

- Are you running Facebook Ads?
- Are you running Instagram Ads?
- Are you running Retargeting Ads on Facebook & Instagram?
- Do you have your Facebook Pixel set up to track user data?
- Are you running YouTube Ads?
- Are you responded to ALL messages & comments on your Facebook & Instagram post & ads within 20 minutes?

## ■ Are you leveraging email & marketing automation?

- Are you following up with your leads within 5 minutes or less via phone, SMS & email?
- Do you have conversion campaigns in place that follow up with unconverted leads 5-7 times via Phone, SMS & email until they schedule their Free Appointment?
- Do you have a database with your customers' email addresses?
- Are you sending out a monthly email newsletter?
- Are you leveraging email to get online reviews & to draw customers into your social media profiles?

## ■ Do you have the tracking in place to gauge your ROI?

- Google Analytics
- Keyword ranking tracking
- Call tracking
- Dashboard showing cost per lead, total spend & projected ROI
- CRM software to track leads to the source & revenue



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# INTERNET MARKETING INITIATIVES

**What are your top 3 internet marketing initiatives that you need to implement to hit your 2023 goal?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Who on your team or externally do you need to meet with to take action on these 3 initiatives?**

## **SEO Strategy**

SEO is not a 'set it and forget it' project. This is a problem many Mortgage Broker companies face. They either try to implement a campaign on their own or they hire a company that may not be the best choice for their industry. In order to succeed with a successful SEO campaign you need an action plan. Using the checklist on the last page will ensure you are starting in the right place.

1. Who will you have run an assessment to determine where you rank today for your most important keywords?
2. Who will track and monitor your ongoing SEO activities?

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# PAID INTERNET MARKETING CAMPAIGNS

Although a good website and a solid SEO plan is important for a long-term plan, it's also beneficial to employ solid paid campaigns along the way

## **What paid initiatives will you implement?**

Pay-Per-Click - Google Adwords, Bing Search Retargeting (Banner Ads) Premium advertising on authoritative directories:

- Angie's List
- Yelp
- YP.com

## **Why Most Pay-Per-Click Campaigns Fail**

- Setup only ONE ad group for all services (Mortgage, VA Loans, FHA Loans, Conventional Loans, etc)
- Don't use specific text ads and landing pages for groups of keywords.
- No strong call to action or offer on the landing page

We have included a pay-per-click marketing worksheet on the following page. Take some time to fill it out to ensure your campaign is the best it can be.

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# PPC MARKETING WORKSHEET

## What AdGroups will you setup?

- 
- 
- 
- 
- 

## Keywords

- List of Keywords that pertain to that AdGroup

## Text Ad

- Should match the keyword, Answer the Question and offer a special incentive if possible.

## Landing Page

- Should be mapped to a specific page on your site that speaks to their specific search or need EG.  
[www.yoursite.com/city-mortgage-programs](http://www.yoursite.com/city-mortgage-programs)

## What keywords go with each ad group?

Group 1 Title –

Keywords:

Group 2 Title –

Keywords:

Group 3 Title –

Keywords:

Group 4 Title –

Keywords:

## Landing Page Content

- Have unanswered questions about mortgage loan? We are here to help. You can reach us any time by calling (844) 555-1234.

Then restate your value proposition, experience, link to reviews, etc

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**Need some one-on-one help?**

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**SCHEDULE  
YOUR STRATEGY  
SESSION WITH**

**Brian Frantz**  
Mortgage Broker Marketing

*If you would like to have me and my team personally review your internet marketing plan and show you where your ranking, where there is room for improvement and how we can work together to make 2023 your best year ever and finally get your internet marketing right. **Then schedule your strategy session by calling us at (877) 959-7970***

Or Schedule your appointment by going to  
**[www.mortgagebrokermarketing.com/schedule](https://appointment.mortgagebrokermarketing.com/schedule)**.

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