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5 Things Every Mortgage Marketer Needs to Know in 2023



Not all mortgage companies are the same. But if you have loan officers catering to mortgage customers, these 5 things will grow your brand and your business in 2023.

How does a loan officer win locally?

Loyal customers and referrals are a main source of business. A waterfall of clients come from a family and their friends that can last a lifetime.

A loan officer wins new business by building relationships with potential borrowers and providing them with the best possible loan products and services. They also work to maintain strong relationships with current borrowers by providing excellent customer service.



Many marketers struggle with the same questions...

How do you help ALL OF YOUR PROFESSIONALS;



scale their local business?



retain the business that they have?



cross sell other products?



build and maintain trust in their local markets?

The 5 ways to answer all your questions and make your marketing team the hero

Mortgage customers usually choose their officers based on trust, right? In a digital world, online reputation is the number 1 way buyers establish trust with a brand. Customer satisfaction and confidence are key to policyholder loyalty and new business for most mortgage companies. The first part to creating confidence is an outstanding experience, the second is accurately capturing and sharing those experiences everywhere, in real time, based on the moments that matter.

Here are 5 reasons you should be using an experience management strategy to capture customer sentiment and power better online reputation:

1. Harness the voice of your customers and borrowers to power your reputation

Turning the voice of your policy holders into an online referral engine is key to helping every loan officer win and grow in their local markets.

Just offering additional services and products is not enough now for a mortgage company. Even if improving a website and a virtual tour experience are undoubtedly vital, doing so is insufficient. Mortgage businesses need a competitive advantage in an era where all house shoppers are now online: reputation management.

You can build up an almost hands-free system that prompts your clients to gather real time feedback, while the customer is still engaged and the data is still actionable, with a reputation management system like Experience.com.

Positive comments are redirected to third party reviews sites for publication, while negative comments are sent back to the agent for special handling to address problems and their own self assessment. This can act as a getaway to newer customers, since data says that 84% customers trust online reviews as personal recommendation.

2. Online search engines rank algorithmically

Capturing and sharing your customer's voice is essential to establishing brand trust. But it's not the only way a brand must build confidence and win locally to be found as the right solution.

Online search is competitive. A good SEO strategy just isn't enough anymore either. Google's online search algorithm is constantly changing and based on hundreds of factors (they keep the full list locked away). But there are 5 major things that make up the majority which mortgage marketers should know in order to optimize and win.

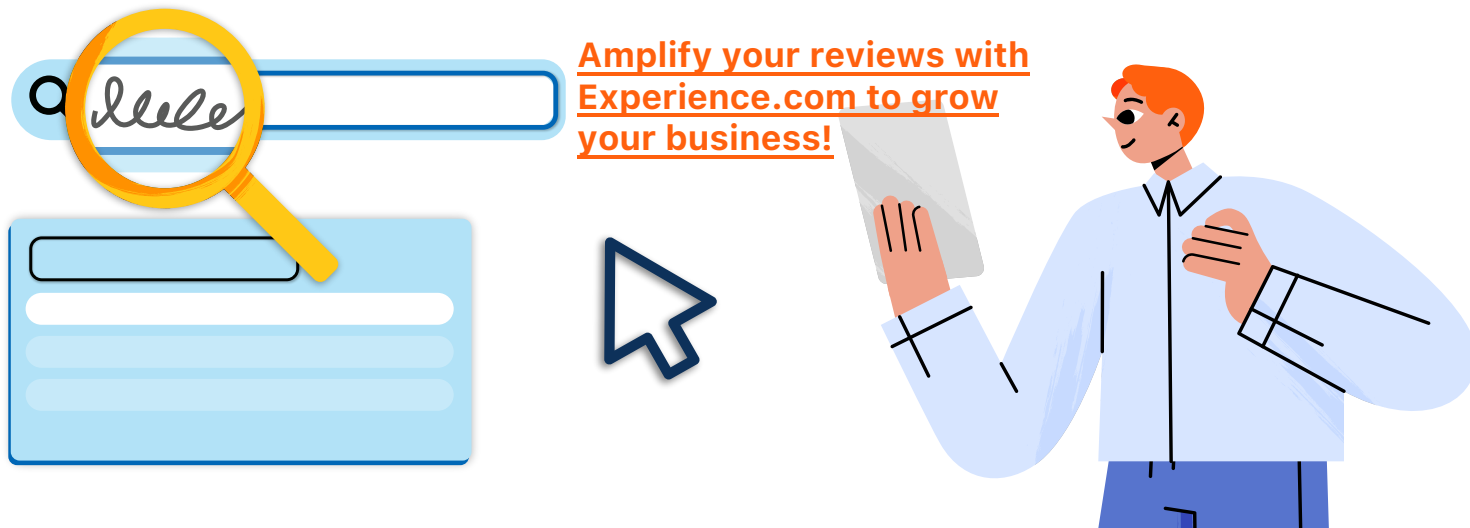
1. Managed Business Profiles: Every location and professional should claim and manage their Business Profiles. This should be accurate and actively managed from the top-down. For larger companies, a solution, like [experience.com](#), can help you do this in bulk and create the best impact.

2. Link Signals: Internal and Inbound links are both important signals to Google when ranking your pages.

3. Review Signals: Of course! Getting your customers writing reviews for your company on Google (and other third-party review sites) is valuable for several reasons, including keyword matches, location trust, replying and more.

4. On-Page Signals: If your site location or about or any other business information doesn't accurately reflect what you claim that you do, that's a red flag to Google. Functionality, security and accuracy are all important on site signals.

5. Citations Signals: Your structured citations, mentions of your business on websites and business directories, should be correct everywhere. In addition, you also must manage unstructured citations, being listed on high authority and industry-specific sites will help you earn credibility and trust from Google.



3. Real time improvement can only happen with real time data

Data deficiency makes personalized experiences hard and there is often a lack of understanding of past interactions. Since it gives lenders a comprehensive view of a consumer, data analytics is crucial to the mortgage sector.

Real time data can create a picture of a customer, and this image informs them of the customer's behavior. This means that real time data can help workers make more informed, customer-based decisions that guarantee increased profit and security for the business.

You need to develop fresh strategies for utilising and analysing accessible data in order to be operationally effective, stand out from the competition, and expand your business as the mortgage sector becomes more competitive.

4. To activate an automated and agile strategy, you need to invest in the right partnership

Spending marketing dollars to power initiatives like these is a complicated landscape to navigate. One partner will bring in high-powered consulting teams and sell you on all their customization and analytics. Another will show you their templates and reports. A third will sell you on their ability to manage your listings at scale.

What you need is a flexible workflow engine that allows you to customize campaigns in real-time from one location. Then, share feedback from happy customers everywhere. You need to be able to send personalized messages to any customer, from any person, at any moment, with complete automation. And finally, you need actional data streaming from every channel, in real time.

[Check out the Mortgage CX Blueprint here!](#)

5. CX transformation begins with employee behavior

Often, we conveniently displace EX when trying to improve customer experiences. But even more, we forget how engagement employee behavior can deliver on desired cx outcomes.

The best customer experiences can be produced by encouraging the best employee behavior. Online reputation management for a business can be greatly influenced by tracking, evaluating, and rewarding user performance. We all enjoy winning, so our leaderboards at Experience.com encourage friendly **COMPETITION** and creative staff rewards. Simultaneously, most of us are motivated by appreciation and approval. Our alerts and sharing tools provide ongoing encouragement and boost the EGO of the employees. Again, nobody wants to inform their boss of subpar work. Our mechanisms for escalation produce employee **ACCOUNTABILITY** right away. The strongest influence on behavior comes from paying for performance. To map CX into employee **COMPENSATION**, you can leverage APIs.

With Experience.com, you can now automate customer feedback!

