



USING VIDEO & SOCIAL MEDIA  
TO PROMOTE MORTGAGE  
PRODUCTS & SERVICES

**MAKE** *it*  
*Happen!*



I'm **Meredith Olmstead**. CEO & Founder of FI GROW Solutions. We work exclusively with financial institutions. Ping me at [meredith@figrow.com](mailto:meredith@figrow.com)



I'm **Scott Hanson**. I'm was an Emmy Award winning investigative reporter before creating ClickVue 17 years ago. We create weekly videos for FIs. Ping me at [scott@clickvue.com](mailto:scott@clickvue.com)



Video is no longer just one piece of your overall marketing plan. It's central to your outreach and especially your social strategy.

Video has absolutely dominated social.

-Hubspot

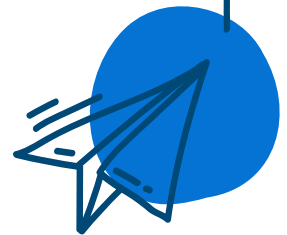


78% of people watch online videos every week, and 55% view online videos every day

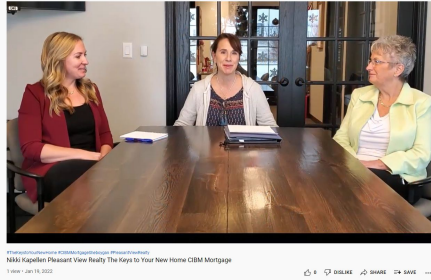
- [Social Media Week/](#)

## WHY VIDEOS ARE THE BEST WAY TO MARKET MORTGAGES

- ✗ Higher conversion rates
- ✗ ROI - 78% of marketers say video increases ROI
- ✗ Builds trust and humanizes your brand
- ✗ Google loves them



# SO MANY OPTIONS



Host/Guest



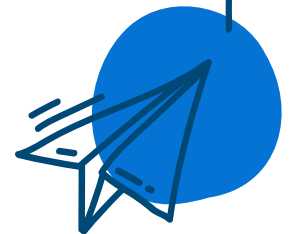
Video with graphics



Real Client Experience

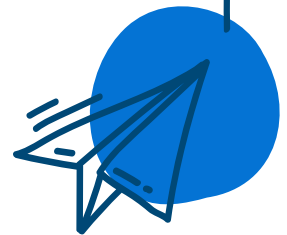


Animation



# UNIVERSAL TRUTH #1 ABOUT VIDEO

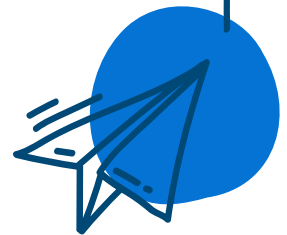
- x Video does EMOTION better than any other medium





## UNIVERSAL TRUTH #2 ABOUT VIDEO

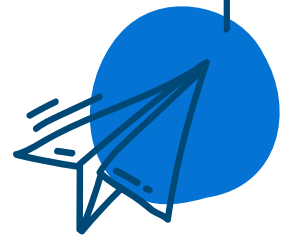
- ✗ Video does STORYTELLING better than any other medium





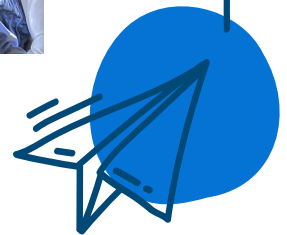
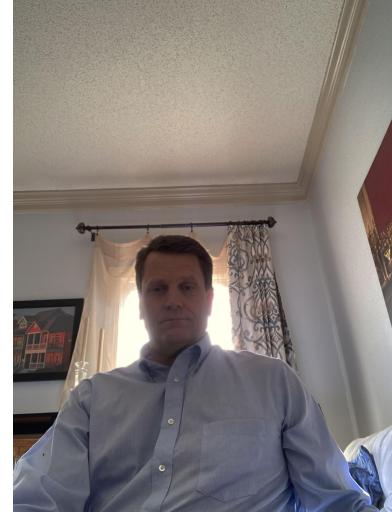
## UNIVERSAL TRUTH #3 ABOUT VIDEO

- x Simple usually isn't simple (but the payoff is worth the work!)



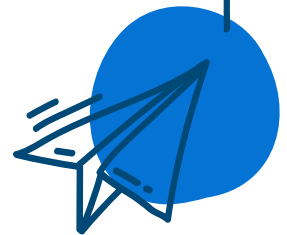
## SIMPLE ISN'T SIMPLE

- X You need to know how to shoot and recognize good video
- X Have a sense of timing
- X Know editing so you can shorten, fix and caption video
- X Good quality is invisible, poor quality can't be ignored



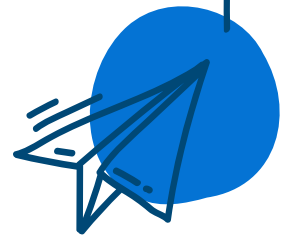
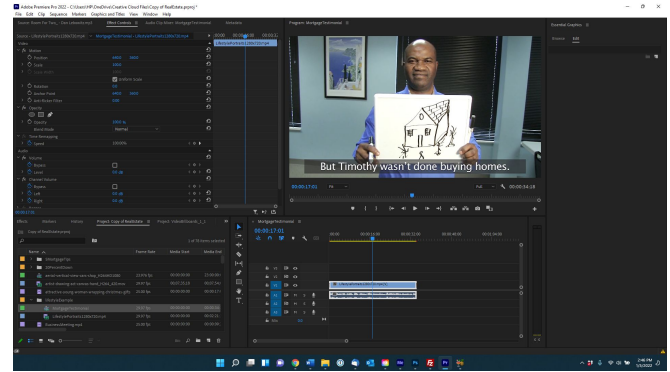
# EVERY VIDEO NEEDS GOOD SHOOTING

- X Landscape like a TV
- X Good lighting on face, enough lighting on background to give a sense of place
- X Good clear audio with a mic on the speaker
- X Slow movements if handheld/use a tripod if not walking around



# EVERY VIDEO NEEDS GOOD EDITING

- ✗ Your video's quality reflects on your professionalism
- ✗ Anything spoken needs captions for ADA compliance
- ✗ The viewer may need guidance about what they're seeing
- ✗ Edit to the bone





# SALES FLYWHEEL

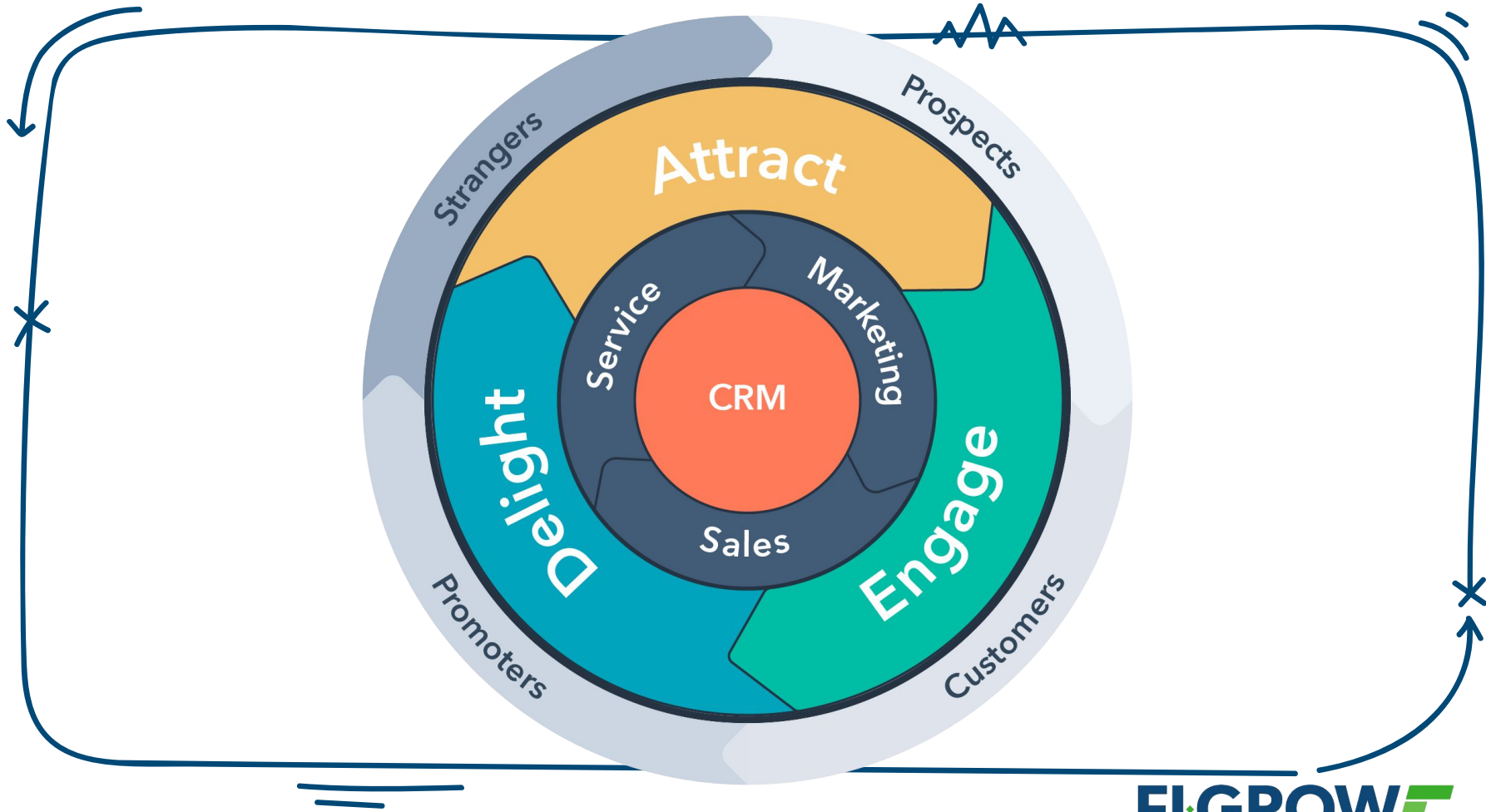
How Video & Social Media Can Help!



72% of customers said they would rather learn about a product or service by way of video

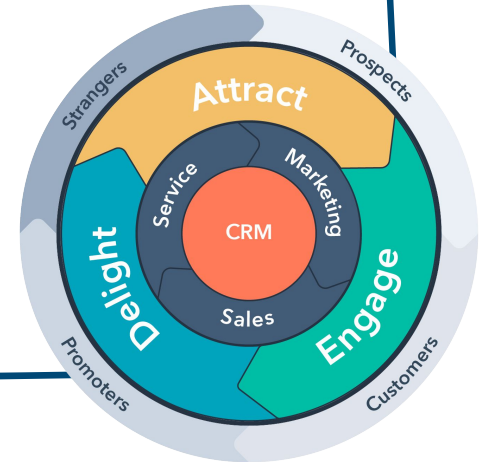
- [Optinmonster](#)





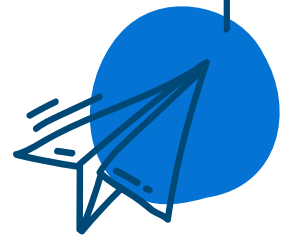
1

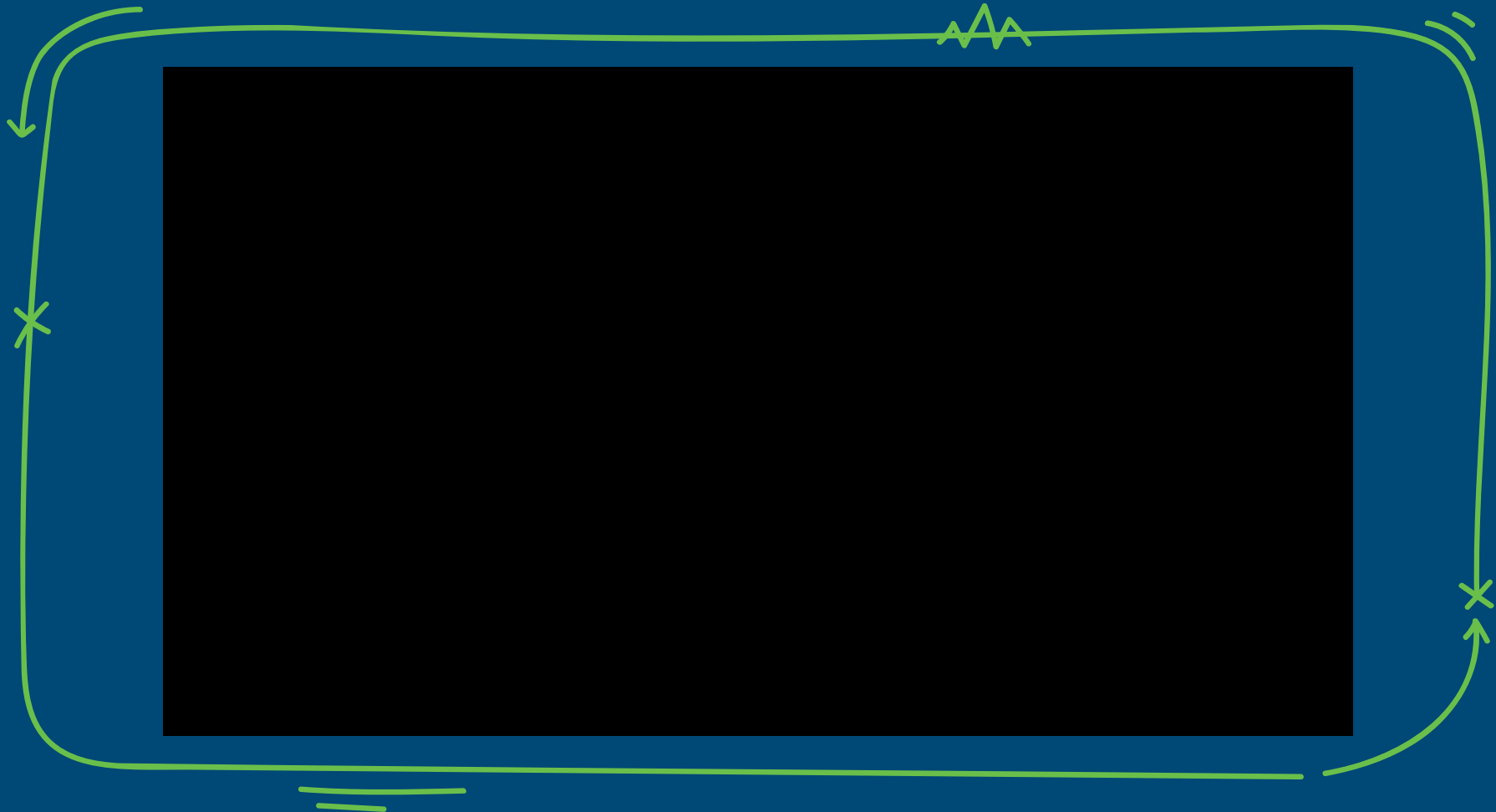
# SALES FLYWHEEL STEP 1: ATTRACT



## VIDEO SALES FLYWHEEL STEP 1: ATTRACT

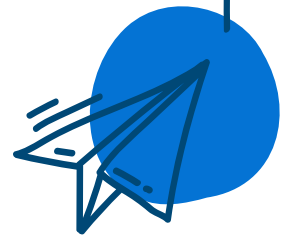
- X SHORT
- X Aspirational, “yes, that’s me!” imagery
- X Interesting “introductory” topics
- X Bite-sized teachings for bite-sized trust
- X Bullet lists (“4 Ways to...”) provide helpful structure





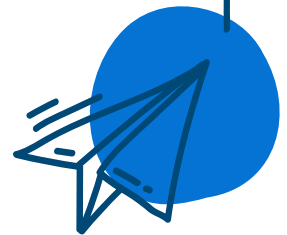
## VIDEO SALES IDEAS FLYWHEEL STEP 1: ATTRACT

- x “4 Things to Look for in a Realtor” featuring a Realtor who banks with you
- x “5 Common Homebuyer Questions” featuring your mortgage specialists
- x “3 Things I Love About My Job” with a loan officer discussing the EMOTION of helping people fulfill their dreams



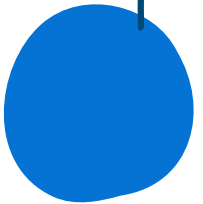
## VIDEO SALES IDEAS FLYWHEEL STEP 1: ATTRACT

- ✗ Shoot video of handing keys to a borrower
- ✗ Shoot video of your new homeowners going in their home for the first time



## SOCIAL SALES FLYWHEEL STEP 1: ATTRACT

- ✗ Testimonials are GREAT on Social Media
- ✗ Consider Pictures of Closings
- ✗ Short Quotes from First-Time Homebuyers





Carolina Trust Federal Credit Union

March 9, 2020 · 🌐

Congratulations to Sarah and Alan on purchasing their first home! We are so honored to be apart of this journey with you, and help you celebrate with a Mortgage Housewarming Party, sponsored by Carolina Trust. We hope you make many wonderful memories in your new home!  
#creditunionlife



Klahoma City

**Allegiance**  
CREDIT UNION

“  
40  
”

Refinanced my house and car and it was the easiest loan I've ever done! Saved 5 years on my mortgage and got my car loan payment down also. If you're looking to refinance, go to Allegiance because their loan officers are very helpful and will work with you!

- Monica

”

👍 9

4 Comments



Raychelle Black - Mortgage Loan Officer

November 17 · 🌐

CLOSING TIME 🏠👤

Carly & Jared Charbeneau are one of the cutest couples I know! It was such a pleasure getting to help them purchase their first home. Also- Brook Chapman is such an amazing realtor, I'm really glad they had her by their side and another one in the books with [Authentic Custom Homes](#). You NEED to check them out if you are looking to go the NEW Build route- They make BEAUTIFUL homes!  
#HomeLoansByRaychelle

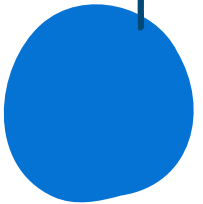


👍❤️ 18



## SOCIAL SALES FLYWHEEL STEP 1: ATTRACT

- ✗ Share Blogs with Tips About Mortgage
  - ✗ Best Neighborhoods to live in is a popular topic
  - ✗ Budgeting is also a great evergreen topic that builds trust
  - ✗ Mortgage Calculators are Also Very Popular in Search





### Middlesex Federal Savings

November 18 at 11:02 AM · 🌐

The first step in buying a home is choosing a real estate agent. This can be good, or it can be ugly, so do your homework. Choose an agent who will actively work for your best interests, an agent who will take the time to get to know you and your goals for your home. You want an agent that is a person you are comfortable interacting with regularly.



BLOG.MIDDLESEXFEDERAL.COM

### Buying A Home: The Good, the Bad, and the Ugly

If you are buying a home, it can be a complicated process if not the right way. Review



### America's Credit Union

May 21, 2018 · 🌐

How much will my fixed rate mortgage payment be? This calculator computes the payments (principal and interest) for a fixed rate loan.

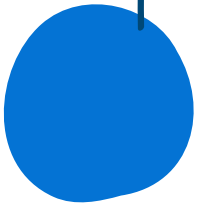
<http://www.americascu.org/home/calculators/calcs...>



👍 1

## SOCIAL SALES FLYWHEEL STEP 1: ATTRACT

- ✗ Show Off Accomplishments of Your Mortgage Team
  - ✗ Awards They Receive
  - ✗ Testimonials About Working With Them





### Allegiance Credit Union

May 4 · 🌐



#TestimonialTuesday

"Not only did I find a fabulous mortgage loan officer, I think I found a lifelong friend. I love this lady!"

Watch to hear more about Carol's overall experience over the past 35 years and her recent home loan refinance with [Raychelle Black - Mortgage Loan Officer](#). 🏠... [See more](#)



jumped right in there and took care of it. I have all the



22

4 Comments 4 Shares

Like

Comment

Share



### Carolina Trust Federal Credit Union

February 4, 2020 · 🌐



Congratulations to Howard Smith, Carolina Trust Mortgage Loan Officer, on being named [Equity Resources](#) Top Loan Officer for 2019. Carolina Trust also received second place in [Equity Resources'](#) Top Lender competition. We are so proud of our mortgage team for their wonderful achievements. Pictured: Howard Smith, Carolina Trust Mortgage Loan Officer; Robert McGeorge VP of B2B [Equity Resources Inc](#); Connie Thompson, Carolina Trust AVP of Mortgage Services.



Christina Naylor and 56 others

15 Comments

Like

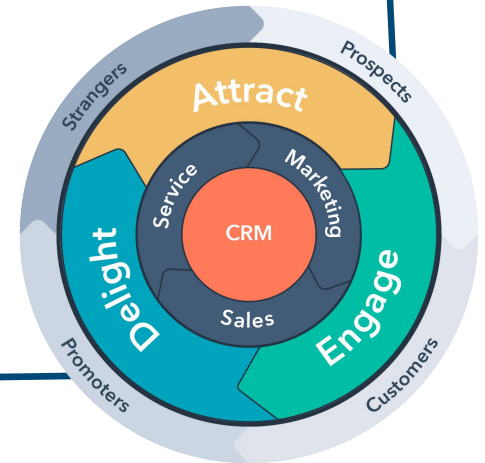
Comment

Share



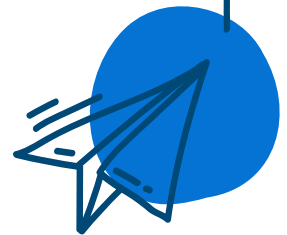
2

# SALES FLYWHEEL STEP 2: ENGAGE

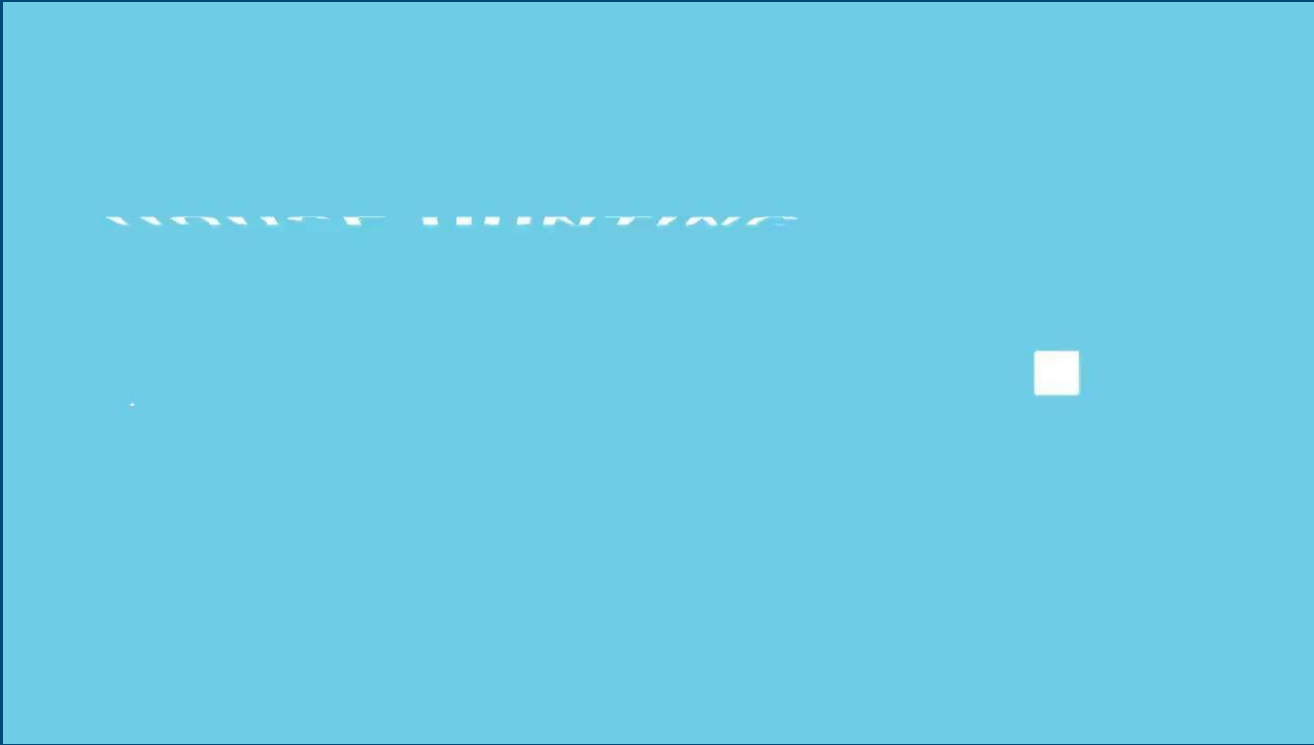


## VIDEO SALES FLYWHEEL STEP 2: ENGAGE

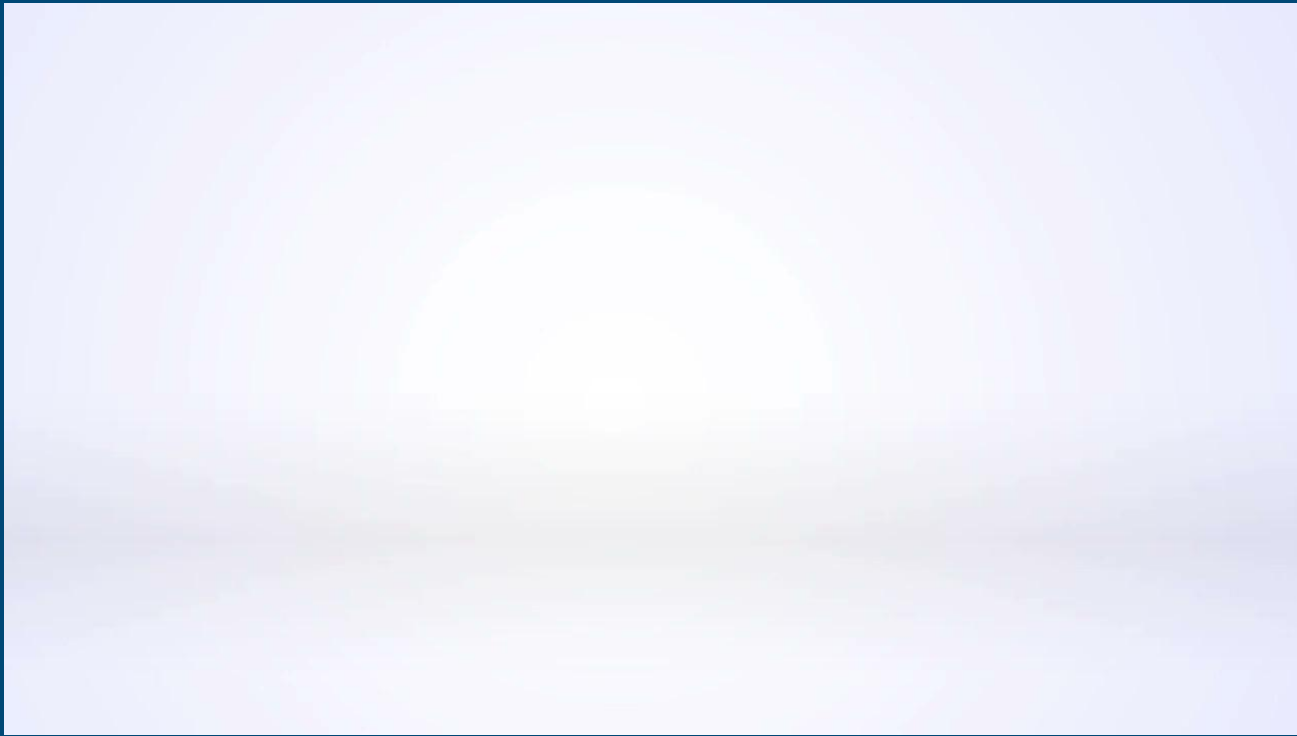
- ✗ Can be longer, but use time wisely
- ✗ Educate the viewer about the process
- ✗ Position yourself as the trusted advisor



x Use analogies to explain complex concepts



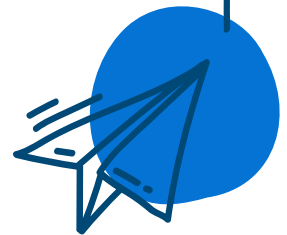
x Use humor





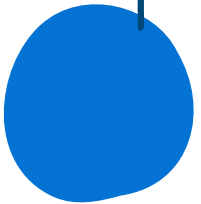
## VIDEO SALES IDEAS FLYWHEEL STEP 2: ENGAGE

- X Loan officer explaining “Top 5 Questions about Closing Costs”
- X Mortgage specialist driving through a neighborhood with tips about buying and selling in a hot market.
- X Have your team together answer “How Much Should You Put Down?”



## SOCIAL SALES FLYWHEEL STEP 2: ENGAGE

- x Turn Mortgage Content into Ads
- x Promote it in your Local Area
- x Target to Previously Engaged Audiences



## Create a Facebook Page Custom Audience



### ★ A new way to reach people who currently like or follow your Page

Now you can reach **people** who currently like or follow your Page by selecting the **people** option in the Events dropdown.

Include **people** who meet **ANY** of the following criteria:

#### Page

FI GROW Solutions

#### Events

Everyone who engaged with your Page

#### Retention ⓘ

365 days

+ Include More People

- Exclude People

#### Locations

People living in or recently in this location

#### United States

✓ Anthem, Arizona City + 15mi

✓ Glendale, Arizona City + 15mi

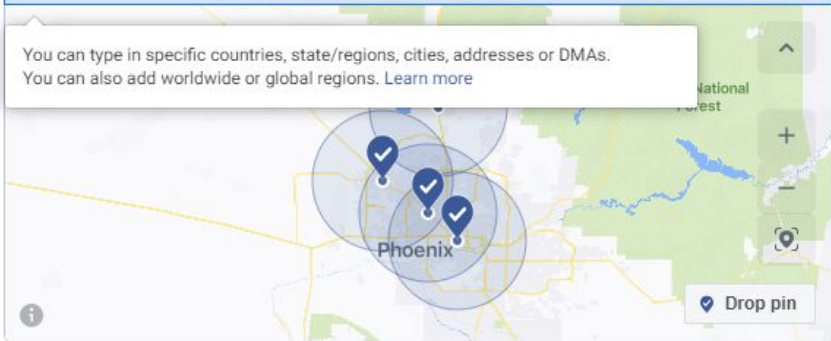
✓ Phoenix, Arizona City + 15mi

✓ Surprise, Arizona City + 15mi

🔍 Search locations

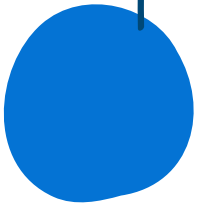
Browse

You can type in specific countries, state/regions, cities, addresses or DMAs. You can also add worldwide or global regions. [Learn more](#)




## SOCIAL SALES FLYWHEEL STEP 2: ENGAGE

- X Focus on Differentiators of your Institution
- X Keep Images Clean & Without Text
- X Include Images with People
- X Include Instagram Feed AND Story Placements for these ads



Middlesex Federal Savings Sponsored



Whether you're just dreaming, looking around, have an accepted offer, or are ready to refinance, we're here to help.


**Quick Close Home Loan - \$250 off Closing Costs**

Equal Housing Lender | NMLS ID #417688

[Learn more](#)

Middlesex Federal Savings Sponsored

Not all jumbo lenders are the same. Making local decisions saves you time and money. Let a Middlesex Federal Jumbo Loan Specialist assist you.



Equal Housing Lender | NMLS ID #417688

MIDDLESEXFEDERAL.COM

**Great Rates, Local Decisions, Rate Lock Option, Quick Close, In-House Servicing**

[Learn more](#)


1 Share

Like Comment Share

Allegiance Credit Union Sponsored

Whether you're looking to purchase a new home, refinance the one you live in now, or use the equity in your home for debt consolidation, home improvements and more - our team is here to help!

Equal Housing Lender | NMLS ID #410417



ALLEGIANCECU.ORG

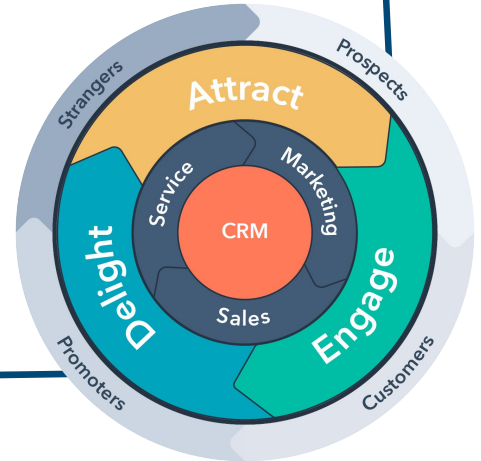
**Mortgages For Purchase or Refinance - Great Low Rates**

[APPLY NOW](#)

Like Comment Share

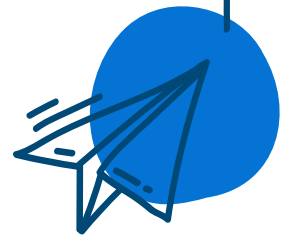
3

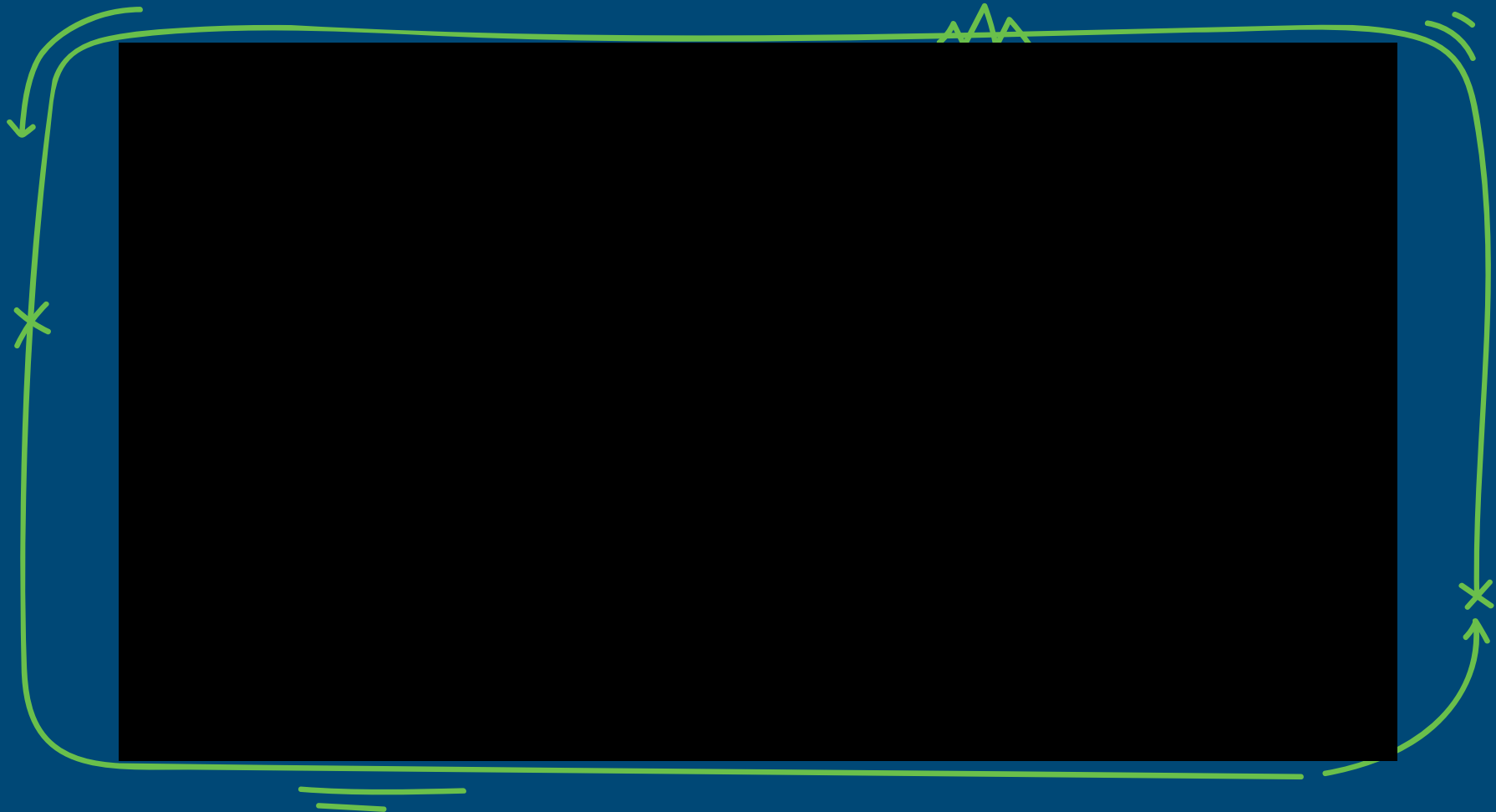
# SALES FLYWHEEL STEP 3: DELIGHT



## VIDEO SALES FLYWHEEL STEP 3: DELIGHT

- x Shift emphasis to repeat business which means refi and home equity products
- x Think “sharable” topics that will make a viewer think “Jenny should see this”
- x Build goodwill with hero stories showcasing dreams you’ve helped come true.

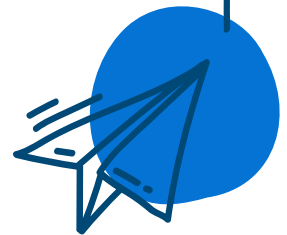






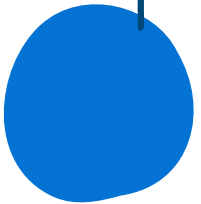
## VIDEO SALES IDEAS FLYWHEEL STEP 3: DELIGHT

- ✗ “5 Great Uses for Your Home’s Equity”
- ✗ “How to Calculate Your Home’s Equity” with a loan officer
- ✗ “The Difference 1% Can Make” about refis with mortgage specialist
- ✗ Showcase a family’s home improvements with before and after videos



## SOCIAL SALES FLYWHEEL STEP 3: DELIGHT

- ✗ Promote LIVE Content on Social
  - ✗ Consider Webinars on Mortgage Topics of Interest
  - ✗ You Can Even Go LIVE on Facebook





**Copper State Credit Union**

Published by Hootsuite · March 23 ·

We hope to catch you all on our Lunch & Learn webinar tomorrow! Learn the pros and cons, top reasons people refi and our favorite mortgage refi calculator.

Save your seat today! <https://www.copperstatecu.org/money-management-webinar...>

## Lunch & Learn:

What Can a Mortgage Refi Do For You?

**Mar. 24 @ 12:30 PM**

Reserve your spot today!



**Copper State Credit Union**

Published by Hootsuite · May 16 ·

Tune in to Facebook Live this Wednesday at noon for your stock market update! We'll be quizzing Ryan G this week.

<https://fb.me/e/3Dq2LPAgd>

## THE SAVVY INVESTOR'S MARKET WATCH

Tune in for a stock market update in an easy-to-digest format.

## SOCIAL SALES FLYWHEEL STEP 3: DELIGHT

- x Run Mortgage Related Contests on Social
  - x HELOC What's Your Dream Renovation
  - x Ugliest House Contest for for Renovation Contest



Do you have a home renovation idea or project you are looking to do?



Carolina Trust FCU is running a contest for you to enter to win a **\$500 LOWES GIFT CARD** towards your home renovation project! All you have to do is take a picture of the place you want to renovate and share why you deserve the prize for this project. The contest will run from Friday, June 5th to Friday, June 19th! The winner will be announced on June 29th through social media and will be contacted directly to claim the prize.

In order to enter this contest all you have to do is fill out the form below with your details and a picture of your home renovation project or idea. Also, describe why your project deserves to get the \$500. We are excited to see what all you have planned!

[Click here for details on Rules and Regulations for the contest.](#)

<b>First name*</b>	<b>Last name*</b>
<input type="text"/>	<input type="text"/>
<b>Email*</b>	<b>Phone number</b>
<input type="text"/>	<input type="text"/>
<b>City*</b>	<b>State/Region*</b>
<input type="text"/>	<input type="text"/>

**Tell us why you think you should win\***

**Upload a Picture of the part of your house you want to renovate\***

 No file chosen

**Are you 18 years or older?\***

- Yes
- No

I have read and understand the contest rules below. (Please Note: If you are younger than 18 years old follow our guidelines for parent permission below)\*

I wish to receive future promotions, notifications and resources from Carolina Trust FCU.

VIEWS

1,352

▲ 9,557.14%

CONVERSION RATE

6.95%

SUBMISSIONS

94

### Step completion

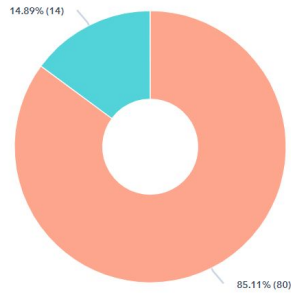
Date range: From 05/01/2020 to 06/30/2020

Action	Count	Completion
Page visits	1,352	53.85%
Visible on sc...	728	24.31%
Interacted w...	177	53.11%
Submitted	94	

### Contact type

Date range: From 05/01/2020 to 06/30/2020

● Submissions from existing contacts ● Submissions from new contacts



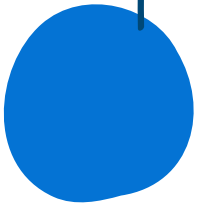
### Submissions by source

Date range: From 05/01/2020 to 06/30/2020

SOURCE	VIEWS ↓	SUBMISSIONS ↓
Paid social	810	8
Email marketing	401	70
Direct traffic	70	10
Organic social	63	6

## SOCIAL SALES FLYWHEEL STEP 3: DELIGHT

- X Show Off the Human Side of Your Financial Institution
  - X Community Events
  - X Donations
  - X How Banking with Your FI is Different from the competition



**Allegiance Credit Union**  
October 15 · 🌐

Thanks to our members' use of the [Oklahoma Project Woman](#) debit card, we've contributed \$4,800 over the past year to help women in Oklahoma!

OPW provides free mammograms, diagnostic procedures and surgical services for Oklahomans with no health insurance and limited financial resources. For every purchase made with the OPW Debit Card, we make a contribution back to the organization. The more the card is used for purchases, the more we can help a great cause.

#ACU\_Cares #C... See more



👍❤️ 71

5 Shares

**Carolina Trust Federal Credit Union**  
Published by Carolina Trust · 🌐 · October 14 · 🌐

At Monday's Annual Leadership Conference, employees participated in several group activities where they had the opportunity to win money for a charity of their choice. Carolina Trust will be making donations to the following selected charities: [Ground Zero](#), [Coastal Animal Rescue](#), and [Fostering Hope](#).



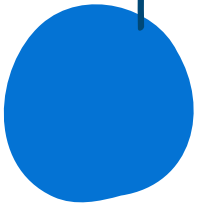
**Copper State Credit Union** added a new photo.  
Published by Hootsuite · 🌐 · August 19 · 🌐

We visited Metro Tech High School for a teacher appreciation luncheon. We are very excited to continue to spread financial education to students through the on campus branch. It's never too early to start learning about finances!



## SOCIAL SALES FLYWHEEL STEP 3: DELIGHT

- X Show Off the Positive Success Stories to Lead Back to Attracting New Customers
  - X Testimonials
  - X Closings with Happy Customers
  - X Others Ways Your Mortgage Team is Giving Back





Allegiance  
CREDIT UNION

Oklahoma City

INTERSTATE 40

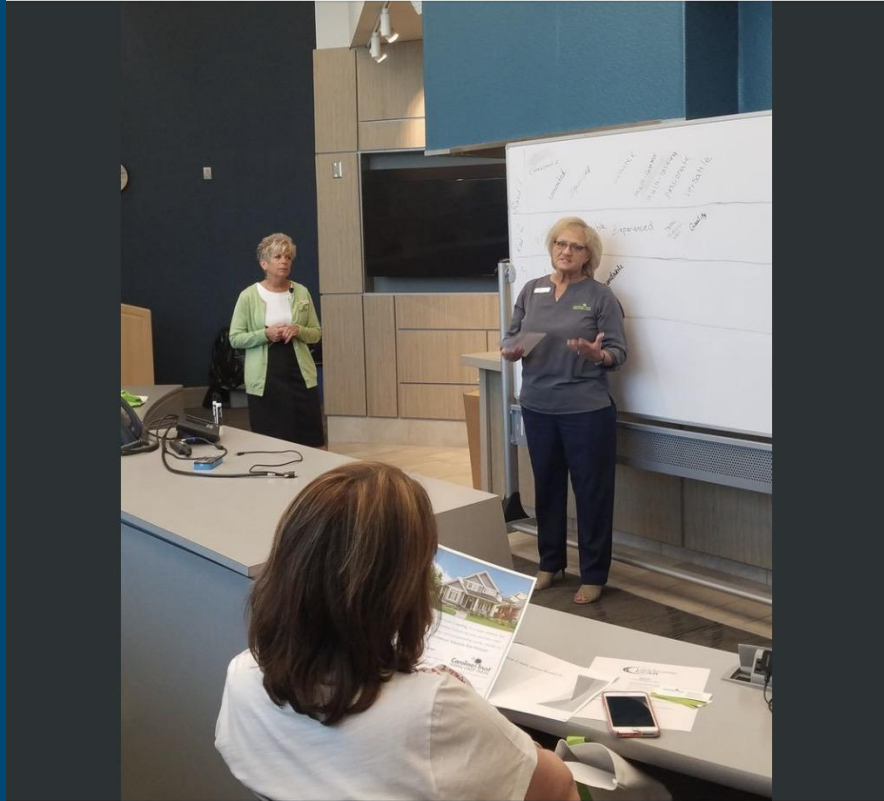
“  
 Refinanced my house and car and it was the easiest loan I've ever done! Saved 5 years on my mortgage and got my car loan payment down also. If you're looking to refinance, go to Allegiance because their loan officers are very helpful and will work with you!  
 ”

- Monica

9 4 Comments

 Carolina Trust Federal Credit Union  
 May 23, 2019 · 🌐

Thanks, [Coastal Carolinas Association of Realtors](#) for allowing our Mortgage Team to present at today's leadership session. They had such a great time getting to speak to our local realtors.



 Christina Naylor and 18 others



By 2022, 82% of the global internet traffic will come from streaming videos and downloads AND

87% of video marketers are satisfied with the ROI of their video marketing efforts on social media

- Cisco & HubSpot

# THANKS!

Any questions?

You can find me at:

 [scott@clickvue.com](mailto:scott@clickvue.com)

Email me and mention this webinar for one free month of full access to the 100's of videos in ClickVue's Video Library.

I'll also send you...





# THANKS!

Any questions?

[www.figrowthacademy.com](http://www.figrowthacademy.com)

X Discount Code:  
X discount30

- Purchase once and share the access with your team to host a training session
- access to content for 1 year
- If more than ONE course interests you, the bundle will be the BEST value to get access to all courses
- Discount Expires Feb 14th

