



Social Media PLAYBOOK





Welcome to the Social Media Playbook, your comprehensive guide to mastering the digital landscape. In the ever-evolving world of social media, staying ahead means not just participating, but excelling. This playbook is your roadmap to effectively harnessing the power of social media platforms.

Here, you will learn the best practices for engaging with your audience, building your brand presence, and leveraging social media to its fullest potential. Whether you're a beginner eager to set up your first account or a seasoned user looking to refine your strategy, this playbook offers invaluable insights and practical steps to transform your social media efforts into a powerful component of your digital marketing strategy.

Let's embark on this journey to elevate your online presence and connect more effectively in the digital world.



SOCIAL MEDIA PLAYBOOK

Get Savvy on Social

Social media is a key aspect of any digital marketing efforts and what's even more important than using it, is using it correctly. This playbook will teach you to effectively utilize social media and leverage the best practices to engage and interact more effectively in the digital world.

Why use it? A key reason is because of the ability it allows you to connect with users. Your presence as an originator makes you a brand and on Instagram alone, 80% of people follow at least one brand or business.

It's an effective way to stay in touch with your database when you don't have the flexibility in your day-to-day life to reach out personally via text, call, or email. By using social media, you are seizing a powerful opportunity to stay connected with your clients, referral partners, and leads.

What We'll Cover:

- How To Set-Up Your Accounts The Correct Way
- How To Clean-Up Pre-Existing Social Accounts and Optimize Them
- Daily Practices To Grow Your Presence
- Leveraging The Social Media Content Provided To You



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1: Back To Basics

From LinkedIn to Instagram, the user demographic's intent remains the same when it comes to social media. That intent is connection. Social media is one of the most dynamic tools at your disposal to grow your brand, develop an online presence, retain your database, and expand your network. If you're not using social media, it's time to rethink any aversion you may have.

Over 40% of the world's population is on social media.¹ That's over 3 billion users that have the potential to discover your page or profile. If you're new to social media, you have a great opportunity to fill a blank slate and curate your brand.

If you're already on social, it may be time for a comprehensive overhaul which this playbook will guide you through.

The very first step to mastering social media is to set goals. When you use social platforms with clear intention, you will be more effective and achieve a stronger

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[HubSpot:https://blog.hubspot.com/blog/tabid/6307/bid/23865/13-mind-bending-social-media-marketing- statistics.aspx](https://blog.hubspot.com/blog/tabid/6307/bid/23865/13-mind-bending-social-media-marketing-statistics.aspx)



SOCIAL MEDIA PLAYBOOK

result. We'll cover how to set these goals later but for now, start thinking over who your target audience would be and why you want to reach them.

Recommended Social Platforms:

- **LinkedIn**

- o Over 154 million American professionals are on LinkedIn.² LinkedIn's users are ideal candidates for home purchasing, refinancing, and other transactions given their professional background and likely resources to make homeownership a possibility.

- o LinkedIn is the perfect place to connect with referral partners, past clients, and current leads. Send an invitation with a personalized message to increase the chances of invitation acceptance.

- **Facebook**

- o With the capability to create a business page and to showcase events and other offerings, Facebook is an optimal platform to begin growing your brand as an originator.

- o If you plan to host home buying seminars or client appreciation events, Facebook has added incentives. Through the platform, you'll be able to create event pages and directly invite and track attendees.



SOCIAL MEDIA PLAYBOOK

- **Instagram**

- o Since 2010, Instagram has been rapidly grown and now has over 1 billion monthly active users.³ With options to share video, images, galleries also known as carousels, and "Stories" which expire after 24 hours, it's a powerhouse platform.

- o Videos on Instagram attract 21.2% more interactions compared to photo posts and 18.6% more traction than carousels. ⁴

- **Twitter**

- o Founded in 2006, Twitter quickly became one of the first platforms to spark online conversations. ⁵ Since then, it's largely used for news delivery and political debates.

- o While we don't recommend devoting time to this platform due to the content demographics, you may choose to use it for sharing client testimonials or financial articles that are relevant and of interest.

- **YouTube**

- o YouTube is one of the original social platforms tailored toward video content. With over 54% of people reporting a desire for more video content online from marketers and 83% of consumers preferring it as their social media platform. ⁶



SOCIAL MEDIA PLAYBOOK

- 2 LinkedIn: <https://news.linkedin.com/about-us#statistics>
 - 3 Instagram: <https://instagram-press.com/our-story/>
 - 4 SproutSocial: <https://sproutsocial.com/insights/social-media-statistics/>
 - 5 Britannica: <https://www.britannica.com/topic/Twitter>
 - 6 HubSpot: <https://blog.hubspot.com/marketing/visual-content-marketing-strategy>
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o If you are ready to make the jump into producing video content, then YouTube is your ideal platform.

Now that you know your social media avenues, you're ready to step into the creation process.

2: Stepping In

It's time to get started with using social media to benefit your business. First, you'll want to grab a mobile device or tablet and open up your phone's app store.

LinkedIn

To get started with posting on LinkedIn, you'll first need to create a profile. Your profile will cover your profession, expertise, experience, licenses and certificates, and any other relevant information you choose to display such as volunteer work or hobbies.



SOCIAL MEDIA PLAYBOOK

When creating your profile, make sure to include the following:

Professional Headshot

First and Last Name

NMLS Id's

Loan Officer Job Title

Biography

Email Address

Build Connections

Once your profile is set-up, be sure to invite your network to connect. You can do this by visiting the "Grow Your Network" page on LinkedIn and sending invites to any connections you recognize. By adding a personalized message to your request, you can increase the chances of the connection accepting.

Gather Credibility

A great way to receive Endorsements and Recommendations on LinkedIn is by providing them to others. Start with your closest colleagues such as referral partners. Endorse their skills you have personally witnessed and write them a professional, 3-5 sentence recommendation. Alternatively, you can submit a request for a recommendation through LinkedIn.



SOCIAL MEDIA PLAYBOOK

Curate Content

With a complete profile and growing connections, you are set to start posting content. Begin by utilizing the content available to you in Total Expert. Log in to Total Expert and visit the "Web Marketing" menu on the sidebar menu, then choose "Social Media" followed by "Create New".

You'll see another menu on the left side with platform choices. Select "LinkedIn Social Media" and if you'd like to refine the results further, go ahead and pick a folder from the upper right corner. Recommended is the "Education" folder which targets learning and working individuals who belong to platforms such as LinkedIn. Once your social image is chosen, click "Share" and then you can either schedule a post or publish the image immediately. Also suggested would be to add your own caption that is specific to your audience and fits with your online presence.

Stay Consistent

It's easy to start out a social presence strong and then waiver as the year goes on. For this reason, you should set aside a time block every other week to dedicate to your social media. Take an hour to review your LinkedIn; accept new connections, comment on posts, respond to messages, and grow your network. Then, plan your posts out for the next 2 weeks by hopping onto Total Expert and using the "Schedule" feature.



SOCIAL MEDIA PLAYBOOK

Facebook

New to Facebook for business? You'll need to begin with a personal profile before you can create a business page. Once you are logged into your personal Facebook account, you can go to the Pages section to start.

Choose the "Business or Brand" option and then set-up the below page segments:

Page Name: Use your first and last name plus Company Info ex. Laura Lo @ Company.

Category: Choose from these relevant categories

Loan Service Financial Service Local Service Mortgage Broker

Profile Photo

Upload your head shot you use on your website

Cover Photo

Your cover photo should have the Co. logo, NMLS, and DRE. You can find this in Total Expert under Facebook Cover Photos.

About

Short Description should include what you offer.

Log description should include your NMLS, DRE, Equal Housing Lender, and NMLS and DRE. These requirements are mandatory in order to maintain compliance.

Location

Email Address, Website, Business Hours.



SOCIAL MEDIA PLAYBOOK

Begin Posting

A variety of Facebook content is ready for you to post from Total Expert. Under "Social Media" choose "Facebook Social Media" from the left-hand menu. Then, scroll through the images until you find one you would like to use on your page.

You can get ahead by scheduling out 2-3 posts per week for the next month.

Find Followers

Grow your Facebook page by sending invitations to "Like Your Page" to your personal Facebook friends or colleagues. You should also take the time to find any referral partner pages and "Like" and "Follow" them as well and send them a brief message inviting them to stop by your page.

When you do this consistently, it's more likely to see your number of likes and follows tick up.

Keep It Up

To continue growing your Facebook page and optimize its benefits to your business, be sure to take advantage of Facebook's "Insights" feature. It will show you how many engagements, views, and reaches your page has had recently. There are numerous stats available that will help you decide which content to post and how to more effectively use your page.



SOCIAL MEDIA PLAYBOOK

Instagram

Instagram's growing platform and evolving roster of features is perfectly suited to your most innovative marketing efforts. If you're brand new to social media, we recommend starting with either LinkedIn or Facebook. For advanced social media users, Instagram is the ideal place to elevate your online presence to the next level. Before setting up an account, you'll want to download the Instagram app which is available on the iOS App Store, Android Google Play Store or Windows Phone Store.

Once the app is on your phone, you'll need to choose "Sign Up" or "Log In with Facebook", the latter is recommended so you can connect your Facebook Business Page. If you opted to sign up from scratch, you'll want to visit "Switch to Business Account" in the App Settings once you complete your profile.

Create Your Feed

We recommend keeping your branding consistent across Instagram. If you are a family-oriented loan officer who likes downtime with family and guiding families into their first homes, those are complementary traits to showcase on your Instagram feed. You want to avoid posting content that conflicts with your business and lifestyle as a loan officer, such as viral reposts, humor posts, or opinionated content that may be better suited to a personal account.

We'll talk more on content balance later but to start, try to use the content on Total Expert under "Instagram Social Media" and mix it in with your own lifestyle posts.



SOCIAL MEDIA PLAYBOOK

Engage and Innovate

A great way to build an Instagram following is by engaging with other accounts. Start with your referral partners such as agents, MI, Escrow, or Title reps you work with. If they have an Instagram follow it and try to engage by commenting or liking a post no more than once a week. This will also give you a chance to review their social strategies and see if there is any inspiration to take away, especially if they have successfully built a large audience.

Capture and Curate

As an Instagram user, you'll want to start finding more opportunities to capture photos or video. If you attend a closing signing, that's a great opportunity for a photo with your clients, if they consent to having their photos shared. Always get a client's permission before taking or sharing their photo and never include any financial documents or secure data in any images.

Hosting a client or network appreciation event? Take photos and tag those who attended. Moments like these provide the perfect way to build content.

Get Analytical

One of Instagram for Business' strongest features is its "Insights". These analytics give you an idea of what content works and what doesn't. It'll also show you who your audience is so future posts can cater to the individuals who follow you.



SOCIAL MEDIA PLAYBOOK

3: Strategies for Success

The deeper you dive into social media, the easier it is to get lost in the routine and time warp it is. But the secret to social media success is keeping a calendar and staying on task.

Creating a schedule is a great place to begin and it will create long-term efficiency and consistency across the platforms. We recommend looking at your Total Expert on the first Tuesday of every month to schedule posts, create "Tasks" in Total Expert for posting all personal content, and engaging with your audience. You'll want to do bi-weekly check-ins with your social pages for optimal success. Find what day works for you and pencil an hour for social on your calendar every other week. The organization of the routine will keep you from getting pulled into other people's posts and getting overwhelmed by a lack of growth.

The true key to social media success is consistency and patience.

Leverage Total Expert

Total Expert takes a huge weight off you when it comes to having your business on social media. You can go to "Tasks" and create a recurring task that reminds you to schedule posts, comment on other profiles, and follow new accounts in order to make sure your page doesn't get neglected. You can schedule your posts right within Total Expert, only Instagram will require manual posting which you can do by downloading your selected content to your phone and copy-pasting the caption from "Share".



SOCIAL MEDIA PLAYBOOK

Schedule a Check-Up

Go beyond just posting and really go in-depth with your intent and goals with social media. Be realistic and strive for small victories. If you aim for 10,000 followers off the bat and only get to 1,000 by the end-of-the-year, it's not time to quit. It's time to reassess your goals.

To properly set goals, answer the following questions:

- Who is your target audience? Past clients, new clients, referral partners?

- What is your goal? Encourage new business? Create refinance transactions?
- Form new partnerships?

- How will social media fit into your life? How much time can you commit? _____
- Is the time commitment worth it to you. _____

Be honest when answering these questions. If you truly want to see business growth from using social media, you will need to commit at least three hours on it every single week.

If you simply want to stay relevant and remain connected to your network, that's great too and will require less of a time commitment.



SOCIAL MEDIA PLAYBOOK

Find Balance

Diversify your content and experience more engagement on your posts by providing your followers with a variety of consistent content. The below percentages are recommended in terms of what categories of posts to share and how often.

- 75% Personal Content
- 15% of Educational Content
- 10% Trending Content

Mastering Content Creation

Feeling stuck when it comes to creating your own content? Here are 30 post ideas you can use right now to liven up your social media feed.

1. Share a family photo
 - a. Let your audience see what your life outside of origination looks like.
2. Share a recent success story
 - a. A client testimonial is great for this category of post.
3. Post a photo of a hobby
 - a. Sharing what you do for fun is a great way to connect with your audience.
4. Share a throwback
 - a. Go back to the beginning by sharing where you started and how you got to here.
5. Ask a question
 - a. Start a conversation. These is even easier if you use Instagram's Questions feature on Stories.



SOCIAL MEDIA PLAYBOOK

6. Create a poll

a. Go even more in-depth with your audience quizzing by hosting a poll through Instagram or Facebook. If you center it around homeownership, it's a creative way to learn where your followers are in their home buying journey.

7. Start a series

a. Coin a hashtag and a series where you can do weekly or monthly posts along a topic.

8. Feature your hero

a. Have a mentor or hero or someone who inspires you? Share a photo of them and how they have influenced you.

9. Show your gratitude

a. Share your thankfulness for where you are with a gratitude post. From a little moment that boosted your day to a big win, share how you were impacted positively.

10. Get local

a. Local content performs exceptionally well so share a recent shot of you at a community event from the local farmer's market to a fundraiser.

11. Giveback

a. Volunteer? Be sure to share about your philanthropic passions by taking photos anytime you're out there giving back. Tag the organization so others can get involved.

12. Post an update

a. Do you have an upcoming event? Share about it and give your followers the chance to meet you.

13. Repurpose content

a. Make something old new again by sharing it in a new way.



SOCIAL MEDIA PLAYBOOK

14. Creatively caption

a. If you're sharing a social post from Total Expert, try putting your own touch on it by adding a caption sharing your own insight or advice on the topic.

15. Open up about a challenge

a. Sharing your victories is great but sharing a challenge you've overcome is even better for resonance. Talk about a time when professionally or educationally you struggled and how you overcame it.

16. Feature your favorites

a. Have a local business you love? Share the love with a photo and tag of them.

17. Share meaningful words

a. Feature your favorite quote and how you let it influence your day-to-day.

18. Share your knowledge

a. Any financial tips or strategies you may have in your breadth of knowledge make for powerful content.

19. Open house invite
a. Have an upcoming open house? Share it to social with some photos of the listing. Or better yet, take a photo with your agent while at the open house. Go beyond by sharing a house tour on Instagram Stories.

20. Share a video

a. Video content is king so if you have the ability to shoot video and share it, go for that. Keep it professional and compliant by submitting your video to the Marketing team for approval prior to posting.



SOCIAL MEDIA PLAYBOOK

How-To

Wondering how to take your custom content to the next level? Here are a couple of free resources you can use to create.

Adobe Spark

The Adobe Spark Starter Plan is completely free and allows you to create custom graphics optimized for social media. From photos, to Instagram Stories, to videos, you can creatively share your ideas. Sign-up with Google, Facebook, or an email address to get started. Spark has designers that have created templates for you to plug in your words and make it your own.

Canva

Similar to Spark, Canva is a template-based platform that starts with a free basic plan. Hundreds of templates are available with text and image capabilities that allow you to easily drag and drop your content.

Snappa

If text based images are your preference, try using Snappa. Snappa is a text design app with minimalistic features and a thorough template library. This service is great for converting a client testimonial from SocialSurvey and converting it into an image.

Desynger

If you want to create content on the go, Desynger is ideal. The iOS and Android app, allows you to start from scratch or use a template to create an image for the social media network of your choosing. It also has a built-in library of royalty-free images and design elements such as shapes and icons.



SOCIAL MEDIA PLAYBOOK

Do's & Don'ts

While it's fun to get creative with social media and let your personality shine through, it's also important to keep it professional. Here are some do's and don'ts to keep in mind:

- **DO Post Consistently:** When followers know how many posts per week to expect, they are more likely to keep following you and engage with your posts.
- **DON'T Post More Than Once A Day:** Over-posting is an easy way to lose followers.
- **DO Create a Schedule:** Mark down the days you plan to post to stay on track.
- **DON'T Sacrifice Quality in Order to Increase Quantity:** If you don't have
 - anything positive or worthwhile to share, it's okay to skip posting. You'll see higher return on well-thought social posts.
- **DO Engage Effectively and Frequently:** It's great to comment and like a post every now and then.
- **DON'T Be Pushy or Needy When Commenting and Following:**
 - Limit one comment per post and don't repeatedly follow and unfollow someone just to get their attention.
- **DO Maintain Integrity and Honesty:** This means not portraying inaccurate
 - information about your experience or business practices.
- **DON'T Overshare or Get Too Personal:** While it's great to open up and give your followers insight into your life, they don't need to know about anything that you would tell someone you've known for less than a month or that you wouldn't share during a meeting.



SOCIAL MEDIA PLAYBOOK

- DO Use Correct Spelling and Grammar: Great punctuation and grammar make it easy to read your posts and to take you seriously.
- DON'T Use Alternating or All Caps: While stylistic formatting and font app add-ins can be fun, they are best reserved for your personal, private account rather than your business page.
- DO Hashtag Strategically: Give your hashtags thought and consider how they will help to make your post more easily discovered.
- DON'T Abuse Hashtags: Limit it to 4 to 5 hashtags per post.
- DO Stay on Trend: Share holiday greetings and leverage industry-relevant national days such as National Home Owners Day or National Real Estate Day.
- DON'T Post Memes or Inappropriate Jokes: Keep it family friendly on social and avoid memes which can discredit your professionalism. If you wouldn't let a child see it, it shouldn't go online.

Ready, Set, Post!

Now that you've learned all the strategies and tools you need for social media success go out there and build your online presence.

Embrace Your Path

As we wrap up the Social Media Playbook, remember that your journey through the dynamic world of social media is one of continuous learning and adaptation.

The strategies and tips provided here are designed to set you on the path to success, but the true essence of social media lies in its fluidity and the personal touch you bring to it.

Stay curious, be authentic, and never stop experimenting with new ways to connect and engage. With the tools and knowledge you've gained, you're well-equipped to build a robust and impactful social media presence that resonates with your audience and amplifies your digital marketing efforts.

Go forth and make your mark in the digital world, one post, like, and share at a time.



For over two decades, we've been mentoring individuals on enhancing their lives through effective planning. Visit our website for additional insights and tools to assist you on your path.

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