



**SEROKA**  
BRAND DEVELOPMENT



# **TOP MARKETING STRATEGIES**

for Mortgage Technology  
Companies in 2024



## TOP MARKETING STRATEGIES --- FOR MORTGAGE TECHNOLOGY COMPANIES

The forecast for the mortgage industry for 2024 is more of the same – it’s a super competitive housing market – and home equity is the highest it has been in decades. Rates are comparatively high – and may even go higher. And there is still very little inventory.

In a nutshell, every loan counts. And marketing is now more important than ever for companies that help facilitate the process of manufacturing a loan.

Given this challenging environment, how can B2B companies that are offering products and services to mortgage lenders not just survive – but thrive – between now and the end of 2024?

**Here are SIX impactful ways to reach your target market along with suggestions to ensure their effectiveness.**

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# 1 | UPDATE YOUR WEBSITE

Did you know that updating your website attracts search engines to crawl it for new information and can even give you a boost in ranking? Your website is the hub of your marketing activities, so it is important to keep it current and relevant. Here are a few ways you can ensure your website is indeed up-to-date and conveying the right information to your target audience:



## 15 SECOND RULE

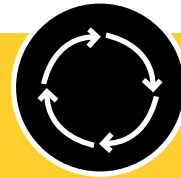
**Have you heard about the 15 second rule?** That's how long you have to get a website visitor's attention – so make sure your most important message is very prominent on your home page. To aid in this, conduct competitive research to better understand how rivals position themselves. Also conduct an internal and external brand audit, collecting feedback from clients and employees on your brand strengths and weaknesses. This information will help you formulate your positioning statements and unique selling points.

Ensure your website has a user-friendly design and easy navigation to capture attention effectively. Utilize these performance evaluation tools to gauge engagement levels:

**Google Analytics:** Analyze metrics like average time on page, bounce rate, and pages per session.

**Heatmaps:** Visualize user interactions with tools like Hotjar, tracking clicks, scrolling, and time spent on each section.

**Session Recording:** Observe and replay visitor sessions using tools like Mouseflow.



## REFRESH YOUR CONTENT

**Updating pages on your website, including blog posts, is one of the best things you can do to improve your page ranking.** It shows Google that you are paying attention to your content and care that your audience sees the most up-to-date information. You will be rewarded for executing regular, quality updates that offer visitors new information and address their specific needs and challenges.

When updating blog posts, there are several important things to keep in mind:

- Update the URL if there is a material change to the title or if it is not getting any traffic because if traffic is there, you do not want to give up that SEO juice.
- Always update the publish date so Google knows the content is updated.
- It is not necessary to update or remove old content that speaks to a specific time period (like COVID oriented content for example). Choosing to update content, remove it or leave it alone can be at your own discretion.

## Did you know that 47% of buyers view three to five pieces of content before engaging with a sales rep?

And companies that blog receive 97% more links to their website?<sup>1</sup> Demonstrate your thought leadership, products, or services by creating a variety of information resources such as videos, blog posts, infographics, and white papers that you can post on your website. If you have difficulty thinking of topics, just ask yourself what questions you are frequently asked by prospects and clients and start from there.

## CREATE NEW AND VISUALLY APPEALING CONTENT



### USE ONLINE AI TOOLS

You can also use AI to help generate some topic ideas. For example, prompt Chat GPT or Google's Bard to come up with blog topic ideas for how technology is helping mortgage lenders overcome appraisal bias. Both platforms can be very helpful, but be sure you understand the differences between them, as well as their capabilities and limitations. [Read this article](#) to gain a better understanding of how each of these AI tools work.



### LEVERAGE SEO

Focus on search engine optimization (SEO) too. Long-form content is more engaging and better for SEO. Search engines like content that is narrow and deep which establishes authority on a topic. According to a study by SerpIQ, the 10 top results in search queries by content length are more than 2000 words. The first result averages 2,416 words and the 10th result averages 2,032. Plus, longer content delivers more backlinks – which is when a page of another website links to a page on yours. Backlinks dramatically improve search rankings. Quality backlinks occur when link creators – people in the industry that link to your content because they consider it to be valuable to their audience – link to it. Short content typically fails to offer enough value to persuade link creators to link to it. That's one of the main reasons long form content improves SEO.



### INCLUDE CALLS TO ACTION (CTAs)

A call to action or "CTA" asks your website users to take a specific action. Usually call to action copy is written as a request or imperative, such as "Sign Up Today" or "Buy Now." CTAs often take the form of buttons and hyperlinks and tell users what to do next. Good CTAs drive the right activity from your audience. Here are a few best practices to follow with your CTAs:

- Use a brightly colored button or link that contrasts with the page design to attract user attention.
- CTA content needs to be the most visible thing on the page. Its location should command attention.
- Emphasize the advantages a user will access by completing a specific transaction.
- Use driven text like "Start Your Free Trial" to promote conversions.
- Keep the CTA short enough to fit into button format. Use five words or less.

## 2

# CREATE COMPELLING CONTENT

**The more content you produce, the more people will find and favor you and your brand if it's relevant to their circumstances.**

**Begin by developing a list of relevant topics that are creating buzz right now.**



### **USE THOSE FAQs**

A list of frequently asked questions from clients or prospects is the perfect place to start.



### **UTILIZE AI FOR BRAINSTORMING**

For example, you may prompt it to develop ideas for blog posts focused on helping mortgage lenders interested in acquiring servicing.



### **MAXIMIZE ONLINE RESEARCH**

During your online research to generate content ideas, it's important to note that Google presents additional sections titled "People also ask" and "Related searches" alongside relevant articles. These sections offer valuable insights into the most searched terms related to your topic. By utilizing this information, you can effectively structure your topic and title to improve your ranking on search engine results pages (SERPs). Moreover, it provides valuable insight into the workings of the Google algorithm, allowing you to optimize your content accordingly.

Another technique is to use Google Trends to identify the types of keywords or phrases people are searching for to create relevant content. It offers access to a mostly unfiltered sample of search requests made to Google. And because it is anonymized (no one is identified), categorized (determining the topic for a search query) and aggregated (grouped together), Google can display interest in a specific topic from around the world or down to city-level geography.

In addition to Google Trends, Buzzsumo and Moz are also good at identifying trends and helping develop topics for blogs or emails. Moz even formats keywords as questions which get right to the heart of conducting a meaningful content search. It lets you more easily identify what your target audience wants to know so you can answer their most pressing questions with your content.<sup>2</sup>



### **TALK TO YOUR EXECUTIVES**

What are they hearing from clients and prospects?



### **LOOK AT INDUSTRY PUBLICATIONS AND ASSOCIATIONS**

What are they writing about? What are the session topics at trade conferences?



### **USE THE EXPERTS**

You have a team of subject matter experts, use them!



### **EMPHASIZE YOUR CORPORATE VALUES**

According to Google Cloud, 82% of shoppers want a brand's values to align with theirs. Consumers are not just looking for savings or a great product, they also want to feel good about spending their money and working with a like-minded company. Here we are defining values as those things a company believes in with respect to client service, charitable endeavors, innovation, our veterans... things that people can get behind.

It's crucial to exercise caution when it comes to supporting or engaging in controversial topics and polarizing political discussions of the moment, as tempting as it may be. Ask yourself if it's truly necessary for the advancement of your brand. Engaging in such discussions can inadvertently generate attention that may not align with your objectives and end up being a distraction. You certainly don't want to find yourself in a situation similar to Budweiser, which alienated its customer base with an ill-conceived approach to attracting new customers.



### **WRITE BLOG HEADLINES THAT ARE SEVEN WORDS OR LESS & USE IMAGES**

According to SEMrush, articles with seven or fewer words in their headline average 36% more organic traffic than those with 14 words or more. And target 70 - 80 characters for your headline as that is the sweet spot. Also, make sure the most important words in the headline appear early on because words that appear later will get cut off with an ellipsis in search results.

In addition, posts with more than seven images get 116% more organic traffic than articles containing just text.



### **USE AI SPARINGLY FOR ACTUAL CONTENT CREATION**

While it's tempting to use an AI tool such as ChatGPT to develop content, be careful. First, the information it provides isn't sourced so it may not be accurate. Currently the Copyright Office will not issue copyrights for AI-generated content since it is not created by a human. Second, never submit any confidential information (i.e., new product launches, sales presentations, etc.) into an AI tool. Some generative AI tools could take the information you enter as prompts for content and, in turn, use it to train future versions of the tool and incorporate that information into the output it generates. In other words, it's not confidential. Unless the tool or platform is identified as closed, everything you enter as a query could end up in the public domain or in someone else's database under which you have no control.



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## DEVELOP WEBINARS

Consider developing 30–45-minute webinars on some of the topics you have identified. Begin with a hot topic. For example, in today’s environment, webinars about successful strategies for weathering a down market, ways to increase leads, or improving workflows for greater efficiency, would resonate. Be sure you don’t make it a sales presentation. Instead, provide useful insights about current issues or upcoming changes such as Fannie Mae’s early assessment and how lenders can meet that new requirement or how they can avoid appraisal bias, etc.

**ELEVATE THE IMPACT OF YOUR WEBINARS WITH THESE STRATEGIES:**

### PANELS WORK!

People like hearing from experts. If you have a few experts, invite them to sit on a panel. Just make sure they are not sharing redundant thoughts.

### RECORD YOUR WEBINARS.

Then edit them as appropriate and share them afterwards via email, on social media and on your website. You can even include a special offer when sending attendees a link to the recording. And, to create even more content distribution opportunities, break up the webinar into sections by questions or topics and include them within blog posts, or use them as promotional videos to drive viewers to a post that delves deeper into a topic covered during a webinar.

### MAKE YOUR WEBINAR AS INTERACTIVE AS POSSIBLE.

You, your panel, or your topic is what draws people to attend. But once they are present, ever notice how the attendee numbers sometimes slip half-way in? Or how many people are still paying attention vs. just have it running in the background while they work? Engage your audience with polls and other media and make sure you answer those chat box questions in a timely manner.

### PROMOTE YOUR WEBINARS THROUGH EMAILS, LINKEDIN AND FACEBOOK.

They are the most effective vehicles to get the word out, encourage attendance, remind participants of when they are taking place, thank attendees for participating and distribute any follow-up materials. Give yourself enough time – the first invitation should be sent two weeks prior to the webinar and a reminder one week before if there is still room for attendees. Reminders should go out 1-2 days prior and the day of to help increase attendance.

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## PRODUCE VIDEOS

**VIDEOS ARE ONE OF THE MOST EFFECTIVE WAYS TO COMMUNICATE TO PROSPECTIVE CUSTOMERS – AND THERE ARE IMPRESSIVE STATISTICS TO BACK UP THAT CLAIM.**

### VIDEO STATISTICS

- **91% of businesses** use video as a marketing tool.<sup>3,4</sup>
- **65% of senior executives** navigate to a site after viewing a YouTube video.<sup>3,4</sup>
- **According to 92% of B2B marketers,** video marketing provides them with positive ROI.<sup>3,4</sup>
- **87% of video marketers** claim that video has directly increased sales.<sup>3,4</sup>
- **YouTube is the most widely used platform** – 90% of marketers use it.<sup>3,4</sup>
- **People are 52% more likely to share video** than any other content.<sup>3,4</sup>
- **69% of consumers say it's more important that a video is authentic** instead of polished with high quality video and audio. But production quality is becoming increasingly important as 36% of consumers feel production value is essential.<sup>3,4</sup>



# PRO TIPS FOR ENGAGING VIDEO CONTENT

## LENGTH

For B2B marketers, Cisco has found that 60-90 second videos are optimal. That is because B2B audiences are typically clicking to learn something new which takes more time to absorb. Consumers also prefer shorter videos – ideally around one minute.

## BE INTERESTING

Set an expectation with the title and video thumbnail and then make sure you fulfill it. If your video is slow, monotone, or comes off as relatively boring, you'll be one step closer to viewer abandonment. And once you lose viewers, it's hard to get them back. So, practice being interesting to bring it all home.

## SHARPEN YOUR POST-PRODUCTION SKILLS

These days it takes a lot to keep viewers interested and engaged. In post-production, play with things like adding captions and experimenting with the tempo – by speeding certain areas up or slowing them down, highlighting words as they are spoken to add energy, incorporating colors and symbols that reflect your brand, and using icons in place of words (for example, instead of spelling out "measure," use an image of a ruler instead).

## CONSIDER SHORT PRODUCT DEMOS

Create a short product demo and include comments from existing customers about how your product has made their jobs easier.

## TESTIMONIAL Q&A

Consider obtaining video testimonials from your clients or an audio recording from them where they discuss why they started working with you and some of the benefits they have experienced. This can be easily accomplished by sending clients an email to see if they are interested (consider offering an incentive to secure their participation), telling them what you are hoping to accomplish, and including the questions you want to review.

If they agree and have production equipment on site, ask them to record it or use their phone if they have a setup in the office with some basic lighting and a tripod to set the phone on. Alternatively, you can record it with them on Zoom, or you can simply conduct an interview and use the information in a short, animated video. Graphics can be added afterwards to highlight key points.

## USE SUBTITLES AND CAPTIONING

This is especially useful on social media platforms where people don't always want their volume on. And don't be afraid to be creative when adding captions. Many attention-getting videos today use creative captioning techniques that include a combination of colors, font size, caps, icons, and various highlighting techniques.

## POST & PROMOTE

Distribute your videos through various media – over LinkedIn and YouTube or through email blasts and include them on your website. And don't forget to leverage social media ad platforms to expand your audience and perform some audience targeting as well.



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# MAXIMIZE YOUR LINKEDIN PRESENCE

**Why LinkedIn?** Because 80% of B2B leads come from LinkedIn; 43% of marketers say they have sourced at least one customer from LinkedIn. And 40% of B2B marketers say LinkedIn is their #1 channel for driving high quality leads.<sup>5</sup> Plus, it is an inexpensive way to promote your products and services and demonstrate thought leadership to different target audiences. For example, if you are trying to reach Compliance VPs at mortgage lenders on the West Coast, with the LinkedIn platform you can target them specifically. You can even upload a prospect list and identify a look-alike audience to build your database.

## OPTIMIZE YOUR CORPORATE LINKEDIN PAGE

Upload a logo and cover photo. Believe it or not, there are some companies on LinkedIn that don't have either. Pages with complete information get 30% more views.<sup>6</sup> Make sure that your About Us section is complete as well (2,000 characters or less) and that it includes relevant keywords.

Additionally, post regular updates. When people want to learn about your company, they visit your company page on LinkedIn. Why? Because they want to see who works at your company, how vibrant your page is, how active you are on it and what you are posting about. They want to peak into the window of your company. If you have zero posts or you don't post very often, it leaves a less than positive impression. Get into the practice of posting two-to-three times per week with a mixture of company updates, information about your team and culture, product/service offerings and industry news. Scheduling tools inform you of the best time of day to post so you can obtain maximum exposure.

## LI CONTENT FORMATS

LinkedIn is the only social network that allows you to post long content. And as stated earlier, the longer the content, the better. Articles up to 1,000 words allow you to showcase your expertise. You can even include images and publish articles as newsletters too. And don't forget to share your existing content and blog posts.

## **BRANDED IMAGERY**

When putting posts on LinkedIn, make sure that you include images to capture attention. Stock photography can be customized with branded image templates. According to LinkedIn's data, images result in a twice as many comments.<sup>7</sup>

## **VIDEOS**

Upload your videos directly into LinkedIn. Videos get five times more engagement than static images. And native videos get more exposures than links to videos that exist on other platforms.

## **PRESENTATIONS**

PDFs and slide decks can be uploaded directly to LinkedIn, allowing you to discuss your unique product features.

## **SPOTLIGHT EMPLOYEES AND AWARDS**

When a new employee starts or an existing one gets promoted, there is a feature on LinkedIn which allows you to recognize staff members. Make sure that you are also applying for company awards and showcasing those on LinkedIn as well.

## **GROW YOUR AUDIENCE**

Want to grow your audience on LinkedIn? Do these things:

- Invite your personal connections to follow your page
- Follow other companies to alert employees at those companies so that they can choose to follow you back
- Promote your LinkedIn page on the bottom of company emails
- Boost posts – pay to target your audience
- Follower ads – pay for follower ads on LinkedIn and update the language often to tweak results

## **MAINTAIN A METRICS LOG**

You can monitor your LinkedIn performance by tracking several critical KPIs, including:

- **Reach:** The overall population that views your material
- **Engagement:** The quantity of shares, likes, and comments
- **Click-throughs:** The quantity of users who went to your website after clicking a link in one of your LinkedIn posts
- **Conversions:** The number of people that clicked through from your LinkedIn post and then completed a specified action on your website, such filling out a form, setting up a call or meeting, or completing a purchase
- **Revenue:** The amount of money you make from using LinkedIn for marketing purposes

**But don't stop with LinkedIn. The best practice is to leverage LinkedIn in conjunction with other social media platforms to have a well-rounded presence.**

## **ENGAGE ON OTHER SOCIAL MEDIA PLATFORMS**

Even though LinkedIn will be your primary go-to channel to generate awareness as a B2B company in the mortgage industry, it is important to establish a presence on other key channels too. Each platform offers unique advantages, allowing for broader engagement and showcasing your corporate personality. Additionally, diversifying your presence provides opportunities for more comprehensive exposure and deeper engagement with your target audience.



### **X:**

X is the perfect platform for marketers who want to connect with prospects in real time and build relationships. In fact, 54% of B2B businesses use X to nurture prospects and turn them into devoted customers. It offers numerous targeting options as well, such as interest targeting, behavior targeting and lookalike audiences that can help you hone in on your target audience. Content that offers insights, advice, or news (such as announcements) in real time increases engagement on X. For example, if you're attending a trade show, you can post live updates. This will help you engage with your audience and position yourself as a thought leader.



### **FACEBOOK**

Facebook is the largest social media platform. Even though it is not primarily a B2B platform, it can still be an effective marketing tool that enables companies to show empathy, demonstrate they understand prospects' and customers' concerns and engage with them personally. Depending on your goals, using Facebook ads in conjunction with LinkedIn ads can be an effective strategy. Facebook also offers several tools that allow you to target users by location, interest, demographic and behavior so you can reach the right prospects at the right time. Facebook is an ideal social platform for posting content that is easy to consume.



### **YOUTUBE**

An increasing number of B2B marketers are turning to this platform to reach and engage with their target audience. By creating informative videos and uploading them to YouTube, you can connect with your target audiences, cultivate trust, and nurture leads. The platform offers several targeting options based on location, age, gender, interests, and behavior.

Educational videos that answer your prospects' and customers' questions perform best because viewers go to YouTube for educational purposes to help facilitate decision-making. So, keep your videos helpful, informative, and interesting to help viewers move down the buyer pathway. To that end, case studies and testimonials will enable you to build credibility with your audience.



### **INSTAGRAM**

B2B marketers are increasingly using Instagram to target, reach and engage with prospects. Instagram can be used to boost brand awareness, drive website traffic, and generate leads by sharing information about your company, its culture, and your product offerings. It is ideal for companies that want to create a strong brand identity by engaging with prospects through impactful visuals. You can target audiences based on user interests, demographics, behaviors, and specific keywords. Photos, videos, and infographics work best on Instagram as they are more likely to capture users' attention.

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# EMBRACE MARKETING AUTOMATION

**Not a new marketing medium but definitely an underrated one, email is still the #1 way to communicate with prospects and customers and is actually stronger than ever before. Why? Because email works.**

- **59% of marketers think email is over twice as effective** at generating leads than PPC or paid social media ads.
- **5 hours** are spent a day checking email.
- **ROI is 3600%** – email generates \$36 for every \$1 spent.
- **The best day for emails is Thursday** but 50% of marketers claim there is no perfect time for sending email campaigns.
- **47% of people open emails** based on the subject line.<sup>8</sup>

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**GIVEN THOSE IMPRESSIVE STATISTICS, LET'S REVIEW SEVERAL EMAIL BEST PRACTICES:**



- **Take some time to segment your email list** before you start to send campaigns to users – the more targeted and personalized, the better. For example, consider targeting by title or job function. The CEO of a mortgage company will be concerned about different things than a branch manager, head of originations, compliance VP, etc. Then, write directly to those people in a way that uniquely captures their attention.



- **Focus on your clients' needs and/or concerns** by acknowledging them and their pain points, and then discuss how your product or service can address them. Send emails once or twice per week – more than that borders on annoying.



- **Write compelling subject lines.** There are many online tools such as CoSchedule that can analyze your subject line copy and rate it in terms of its effectiveness, highlighting areas such as words that increase/decrease opens, word/character count, the presence of numbers and emojis, etc.



- **Use graphics in your emails** – those that have some sort of graphics have a higher open rate (27%) than text-based emails.

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## SOCIAL MEDIA AND EMAIL AUTOMATION

Social media and email automation have become essential tools for B2B marketers, empowering them to streamline communication, expand their reach, and cultivate meaningful relationships with potential clients. Social media management platforms like Sprout and HootSuite, along with email automation platforms such as Marketo, Pardot, Mailchimp, HubSpot, ActiveCampaign and others, offer you the means to engage with your target audience at scale.

Social media automation involves utilizing software or tools to schedule and manage social media posts, track engagement metrics, and automate tasks such as responding to comments or messages. This automation saves time and ensures consistent content delivery. You can leverage social media automation to share industry insights, thought leadership content, case studies, and product updates. By automating social media activities, you can maintain an active online presence, engage your audience, and establish yourself as a trusted mortgage industry expert.

Email automation, on the other hand, enables you to create personalized and automated email campaigns. By leveraging CRM software and automation platforms, you can trigger targeted emails based on specific actions or events, such as website visits, form submissions, or webinar registrations. This allows for timely and relevant communication with prospects and clients alike. You can utilize email automation for lead nurturing, sending newsletters, promoting webinars or events, and providing valuable resources to educate your audience. By automating email workflows, you can deliver personalized content that addresses the pain points and challenges your prospects and clients may be experiencing.

To optimize the use of social media and email automation, consider these best practices:

1. Define the target audience and create buyer personas to understand their needs, goals, and preferences. This insight will enable you to tailor your messaging and content to resonate with your audience.
2. Focus on providing value and building relationships rather than solely promoting your products or services. By offering industry expertise, sharing relevant content, and engaging in conversations, you can position yourself as a trusted advisor and nurture long-term relationships.
3. Segment your email lists by industry, job title, or company size to personalize and target messaging for higher engagement and conversion rates.
4. Regularly monitor and analyze the performance of social media and email campaigns to gain valuable insights for optimizing future strategies and content.

Social media and email automation present invaluable opportunities for B2B marketers to streamline communication, expand their reach, and foster strong relationships with potential clients. By effectively utilizing these tools and following best practices, you can enhance your marketing efforts, generate more leads, and drive business growth.

**In this unusual mortgage market, it's more important than ever to have smart content strategies in place so you can successfully compete through the remainder of the year and beyond.** There are things you can do right now to keep in front of your prospects and clients and begin to drive engagement. After shoring up your website, begin creating an ample amount of compelling content in different formats such as webinars, videos, infographics, blog posts and white papers. After that, focus on pushing that content out, ideally to targeted audiences in a personalized way, via social media and email automation. Also be sure to populate your website with your new content to keep it relevant and keep site visitors coming back for more. If you take these steps now, you'll be able to build stronger relationships with prospects and clients and come out of these challenging times on top.

**If you want more tips or need help with any or all of these strategies, contact us today. We'd be happy to lend a hand. [Click here](#) for more information about Seroka and what we can do for you.**

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