ACTIVECOMPLY

INSTAGRAM GUIDE FOR LOAN OFFICERS

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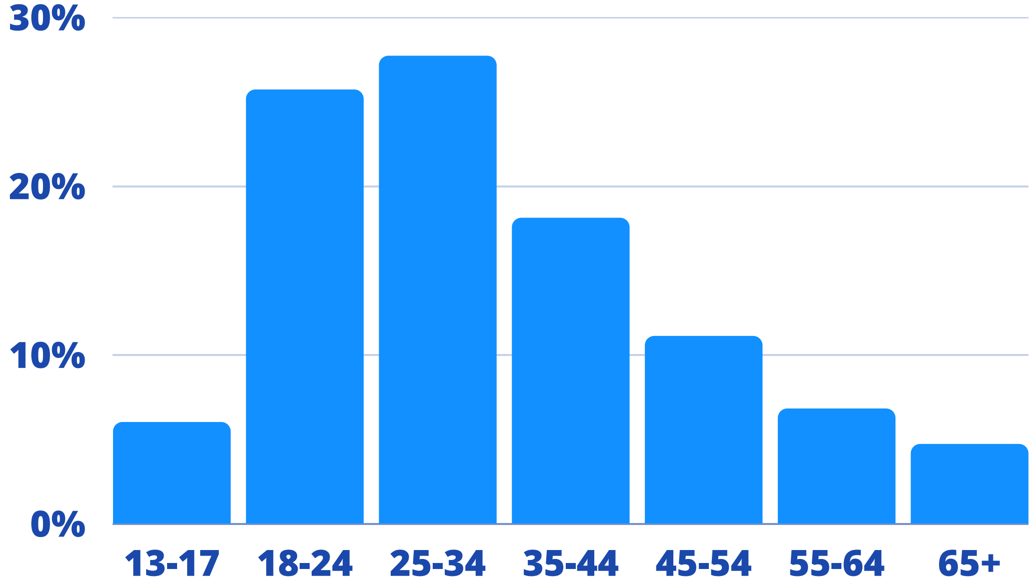
WHO YOU CAN REACH

THE VALUE OF SOCIAL SELLING ON INSTAGRAM

Instagram is an effective platform for social selling because it allows mortgage loan officers to reach their target audience and build relationships with them. With its visual-first approach, Instagram provides a unique opportunity to engage potential customers through creative content. Additionally, Instagram's features such as hashtags, stories, and product tags make it easier for loan officers to promote their products and services.
When it comes to who you can reach on Instagram, the possibilities are endless. You can target people of all ages and backgrounds, from Gen Zers to Baby Boomers.

SHARE OF INSTAGRAM USERS BY AGE GROUP

AS OF MARCH 2023 (UNITED STATES)



By utilizing the power of social selling on Instagram, loan officers can build relationships with prospects in a more meaningful way and increase their chances of gaining new customers. With its vast user base and high engagement rates, it's an effective way to reach potential customers and showcase your expertise in the mortgage industry.

Sources:
https://www.statista.com/statistics/398166/us-instagram-user-age-distribution/

CREATE AN INSTAGRAM PROFILE

Creating an Instagram Business Page is a great way to promote your business, connect with customers, and increase your reach. Here's how to get started:

Step 1: **Sign up for an Instagram account**
If you don't already have an Instagram account, create one by downloading the app and signing up.

Step 2: **Convert your personal account to a business account or create a new one**
If you have an existing personal account you want to use for your business, you can convert it to a business account. If not, create a new account specifically for your business. Once you have your account, tap the three horizontal lines in the top right corner and select "Settings". From there, select "Account" and then "Switch to Professional Account". You'll be asked to select a category for your business and enter contact details like your email address and phone number. This will give you access to features such as analytics and insights, as well as ad options.

Step 3: **Add your profile picture and bio**
Next, you'll need to enter some basic information such as your name, website URL, contact information, address, etc. Make sure all of this information is accurate so that customers can easily find you online! For instructions on how to make your profile compliant, download our 2023 Profile Compliance Guide here.

Access our Profile Compliance Guide

Step 4: **Start posting content**
Start posting engaging visual content on your page. Use high-quality images and videos that showcase your products or services. Use relevant hashtags and geotags to reach a wider audience.

By following these steps, you can create a strong Instagram presence for your business and attract new customers.

Source:
https://help.instagram.com/502981923235522

CREATING CONTENT

Using Instagram as a mortgage loan officer can be an effective way to connect with potential customers and build relationships. Here are some tips for using Instagram to sell mortgages:

- Share informative posts about the home buying process. Educating potential customers about mortgages can help them feel more comfortable when making their decision.
- Post customer testimonials and reviews. Showing off positive experiences from past customers can help build trust with potential buyers and encourage them to work with you.
- Utilize relevant hashtags so that more people can find your content and engage with it. Joining conversations via hashtags can also help you connect with other industry professionals and expand your network.

Best Practices for Engaging With Followers:

Engaging with followers is an important part of being successful on Instagram as a mortgage loan officer.

- Respond promptly to messages and comments so that potential customers know they're being heard and valued.
- Ask questions in captions or stories to start conversations and get feedback from followers about what type of content they'd like to see from you in the future.

Creating Engaging Content

When creating content for Instagram, it’s important to keep in mind what resonates with your target audience. Mortgage loan officers should focus on providing helpful information about the industry as well as tips on how to navigate the loan process. Additionally, they should consider using visuals such as infographics or videos to make their posts more engaging. It’s also important to post regularly so that followers know when to expect new content from you.

Leveraging Instagram Features

Mortgage loan officers can leverage several of Instagram's features in order to promote themselves. With Instagram, loan officers can post pictures, videos, live content and stories to engage with their audience. Loan officers can also use Instagram's newest features such as Reels and IGTV to share creative content that will capture the attention of potential customers.

By utilizing these features, mortgage loan officers can create an effective social media strategy that will help them build relationships with potential customers and increase their business.

MEASURING SUCCESS

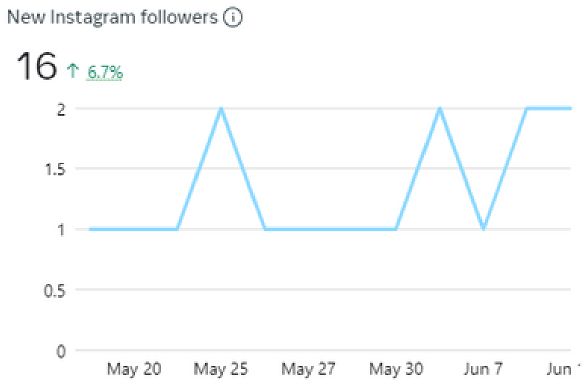
As a mortgage loan officer, it's important to measure the success of your social media marketing efforts on Instagram.

Here are some key metrics you should track to determine if your strategies are working:

Engagement rate: This is the percentage of people who engage with your posts (likes, comments, shares). A higher engagement rate indicates that your content is resonating with your followers.

Reach: This is the number of people who see your posts. A higher reach means more potential customers will be exposed to your content.

Follower growth: Tracking how many new followers you gain over time can help you gauge whether or not people are interested in what you have to offer.



Evaluating Your Progress

Evaluating your progress on Instagram is key for understanding what works and what doesn't when it comes to selling mortgages through social media marketing.

1) Regularly check analytics like impressions, reach, engagement rate, etc., so that you have an accurate picture of how well each post performs relative to others.

2) Adjust your approach based on what's resonating most with your audience - if certain types of posts get more likes than others, focus on creating similar content in the future!

Source: https://business.facebook.com/latest/insights/

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SocialShield

Keep your company-affiliated social media accounts compliant with 24/7 monitoring, automated profile discovery, and customizable content alerts.

WebCompass

Monitor websites for: marketing compliance, ADA accessibility, SEO tracking, website error identification, automated archival, and more.

LicenseLink

Licensing, disclosures, customized links, and employee and company contact information - all in one compliant digital business card.

VirtualVerify

Confirm the compliance of remote workers and multi-location branches with regulatory workspace requirements through geolocation tracking, IP address confirmation, and photo and video capturing.

Access other free compliance resources at www.activecomply.com

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