



## TOOLS TO HELP YOU CREATE CONTENT

### Content Creation Tools:

#### [Canva](#)

A user-friendly graphic design platform perfect for creating polished social media posts, stories, marketing materials, and brand visuals. Ideal for beginners and pros alike.

#### [CapCut](#)

A powerful, easy-to-use video editing app that makes it simple to create short-form content like Reels, TikToks, and Stories with transitions, captions, and effects.

### Content Planning & Scheduling:

#### [Later](#)

A drag-and-drop visual planner that lets you schedule Instagram, Facebook, LinkedIn, and Pinterest posts in advance. Includes hashtag suggestions and analytics to track performance.

#### [Chat GPT](#)

Your AI-powered content assistant! Use it to brainstorm content ideas, write engaging captions, repurpose posts, or generate entire content calendars in minutes.

#### [Google Trends](#)

A free tool to explore what topics people are searching for in real time. Great for staying ahead of trends and creating timely, relevant content your audience actually cares about.



## GUIDE TO CANVA FOR CONTENT CREATION

Canva is an intuitive graphic design platform that empowers users to create stunning visuals without the need for extensive design experience. Whether you're crafting social media graphics, presentations, posters, or other visual content, Canva offers a vast array of templates and tools to bring your ideas to life.

### Getting Started with Canva:

1. **Sign Up:** Visit [Canva's website](#) and create a free account using your email, Google, or Facebook credentials.
2. **Explore the Dashboard:** Once logged in, you'll encounter a user-friendly dashboard. Here, you can start a new design, access existing projects, and explore various design templates.
3. **Choose a Template:** Canva offers thousands of professionally designed templates tailored for different purposes. Browse through categories or use the search bar to find a template that aligns with your project.
4. **Customize Your Design:** After selecting a template, you can personalize it by:
  - **Editing Text:** Click on any text box to modify the content, font, size, color, and alignment.
  - **Adding Images:** Upload your own images or choose from Canva's extensive library of free and premium photos.
  - **Incorporating Elements:** Enhance your design with shapes, lines, icons, and stickers available in the "Elements" tab.
  - **Adjusting Layouts:** Move, resize, or rotate elements to achieve your desired composition.
5. **Save and Share:** Once satisfied with your design, click on the "Download" button to save it in your preferred format (e.g., PNG, JPEG, PDF). You can also share your design directly via email or social media platforms.

### Best Tutorial Video for Beginners:

▶ [Canva Tutorial For Beginners: A Free 2 Hour Masterclass](#)

This tutorial covers the fundamentals of Canva, providing step-by-step instructions to help you become proficient in using the platform.



## GUIDE TO CAPCUT FOR CONTENT CREATION

### What is CapCut?

CapCut is a free, all-in-one video editing app by the makers of TikTok (ByteDance). It's available on desktop and mobile, and it's beginner-friendly while still having powerful features like auto captions, background remover, and trending templates. Perfect for creating short-form video content for platforms like Instagram, TikTok, Facebook, and YouTube.

### Getting Started with CapCut:

#### 1. Download the App

- Mobile: [iOS](#) | [Android](#)
- Desktop: [CapCut Web Editor](#)

#### 2. Start a New Project

- Tap "New Project" and import your video clips, photos, or screen recordings.
- You can also use CapCut templates if you want a pre-designed layout that follows a trend.

#### 3. Basic Editing Tools

Once your clip is loaded, use these core tools:

- Split: Cut the clip into sections.
- Trim: Adjust the beginning/end of the video.
- Speed: Make clips faster/slower.
- Text: Add regular text or use auto-captions (a fan favourite).
- Audio: Add music, voiceovers, or sound effects.
- Filters/Effects: Use trending transitions or visual effects to polish your video.

#### 4. Add Captions Automatically

- Tap Text > Auto Captions.
- Choose language and speaker type (if needed).
- CapCut will transcribe your video into text automatically—perfect for mortgage videos where clarity matters!


#### 5. Resize for Social Media

- Tap Canvas > Format and choose the correct size:
  - 9:16 for TikTok, Instagram Reels
  - 1:1 for Instagram Feed
  - 16:9 for YouTube

#### 6. Export & Share

- When you're done, hit Export (top right).
- Choose your resolution (1080p is standard) and export.
- Post directly or save to your device.

### Best Beginner Tutorial on YouTube:

 [CapCut App Video Editing Tutorial - COMPLETE Guide \(2025\)](#)

This tutorial is easy to follow, super practical, and great if you're editing for business content.



## GUIDE TO LATER FOR CONTENT PLANNING

### What is Later?

Later is a social media planning and scheduling tool that lets you visually organize your content calendar, auto-publish posts, track performance, and even find user-generated content (UGC). It's especially useful for Instagram, but also works for Facebook, TikTok, Pinterest, LinkedIn, and X (Twitter).

### Key Features at a Glance

- Visual Content Calendar: Drag and drop your posts into a calendar view.
- Auto-Publish: Schedule and forget it – Later will post for you.
- Media Library: Store all your photos/videos in one place.
- Linkin.bio: Create a clickable link page for Instagram bios.
- Analytics: Track what's working and refine your content.

### Getting Started with Later

#### 1. Create a Free Account

- Go to [Later.com](https://later.com) and sign up.
- Connect your social media accounts – start with Instagram, then add others (Facebook, TikTok, etc.)

#### 2. Upload Your Media

- Drag and drop your photos/videos into the Media Library.
- Tag them with labels like “Refinance,” “Tips,” or “Client Wins” to stay organized.

#### 3. Create a Post

- Select a photo/video → Click “Create Post”.
- Choose the platform(s), write your caption, and add hashtags (Later will even suggest hashtags).
- For Instagram: You can add First Comment and schedule Stories or Reels (via mobile notification).

#### 4. Drag & Drop into the Calendar

- Use the Visual Calendar to plan posts across the week or month.
- Drag the post into your desired time slot, and Later will auto-publish it if allowed.

#### 5. Use Linkin.bio (Optional but Awesome)

- Set up your Linkin.bio to turn your Instagram bio link into a clickable hub (like Linktree).
- Great for mortgage agents who want to direct followers to rate calculators, applications, blogs, etc.

#### 6. Track Your Analytics

- Check your Instagram/Facebook insights to see:
  - Best time to post
  - Top performing posts
  - Follower growth & engagement rates

### Best Beginner Tutorial on YouTube:

[▶ How To Use Later for EFFECTIVE Social Media Management | Later Tutorial](#)

Super beginner-friendly and perfect for service-based businesses like mortgage pros!



# ChatGPT PROMPT GUIDE FOR CONTENT PLANNING

## 1. Key Elements of a Great Prompt:

- Your goal (awareness, lead gen, engagement, education, etc.)
- The platform (Instagram, Facebook, TikTok, LinkedIn)
- The format (caption, video idea, full post, etc.)
- Your target audience
- Your topic or niche
- Any tone/style you prefer (casual, professional, witty, etc.)

### **Use phrases like:**

"Avoid buzzwords", "Make it beginner-friendly", "Write in a Q&A format", or "Make it trending and attention-grabbing"

## **BONUS TIPS**

If the output is too generic, follow up with:

- "Can you make this more specific to my audience in Ontario?"
- "Rewrite this to sound more casual and witty."
- "Make it sound like something I'd actually say."

## 2. Caption Creation Prompts

- **Instagram Caption Prompt**  
"Write a short, engaging Instagram caption about the importance of getting pre-approved for a mortgage. My audience is first-time homebuyers in their 30s. Keep it casual but informative. Add 3 emojis and 5 relevant hashtags."
- **Facebook Caption Prompt**  
"Create a Facebook post explaining the benefits of mortgage refinancing in simple language. Make it educational, friendly, and encourage people to DM me to find out if they qualify."

## 3. Generating Content Ideas

- **Content Idea Prompt**  
"Give me [X amount of] content ideas for [specific platform] as a mortgage agent in [the areas you live/work in] who helps [your usual client/business types]. Mix [eg; educational tips, myth-busting, and relatable funny content.] Keep each idea short and trending-friendly."

## 4. Writing Full Posts

- **LinkedIn Post Prompt**  
"Write a professional yet personable LinkedIn post introducing me as a mortgage agent in Ontario who just helped a family buy their first home. Make it authentic and subtly mention that I'm open for new clients."
- **Carousel Post Content**  
"Write the text for a 5-slide Instagram carousel post titled '5 Things You Didn't Know About Pre-Approvals'. Each slide should be short, punchy, and written for a 30-something Canadian first-time buyer."

## 5. Video Script / Reel Ideas

- **Script Writing Prompts**  
"Write a TikTok video script under 60 seconds that debunks the myth that you need 20% down to buy a home in Canada. Start with a controversial hook but keep it conversational, confident, and end with a call to action to follow for more mortgage tips."

## 6. Specific Use Cases

- **SEO Blog Ideas**  
"List 10 blog post ideas for a mortgage agent in Canada targeting Google search traffic from first-time buyers."
- **Weekly Content Plan**  
"Create a 1-week content plan with daily Instagram post topics and formats for a mortgage agent who focuses on refinancing."
- **Podcast Topics**  
"Suggest 5 podcast episode ideas for a mortgage and real estate podcast aimed at millennials."
- **B-Roll Video Ideas**  
"Give me 10 faceless Instagram reel content ideas using trending audio for a mortgage agent."



## GOOGLE TRENDS GUIDE FOR CONTENT PLANNING

**Step 1: Go to [trends.google.com](https://trends.google.com)**

**Step 2: Search a relevant topic**

Type a keyword your audience might be searching for, like:

- "Mortgage rates"
- "Homebuyer incentives"
- "Refinancing"
- "Buy vs rent"

Goal: You want to see how interested people are in this topic right now and over time.

**Step 3: Refine your filters**

Adjust the settings at the top:

- Location: Choose Canada or narrow to your province or city
- Time Range: Use "Past 90 days" for relevance or "Past 5 years" to spot patterns
- Search Type: Choose "Web Search" (for general info) or "YouTube" (for video ideas)

Goal: Get data that reflects your local audience and current content window.

**Step 4: Read the graph**

This shows search interest over time (0–100).

- Spikes = hot content idea
- Consistent growth = evergreen idea
- Downtrending = maybe skip it for now

Use this to decide when to post or talk about something.

Example: If "RRSP home buyers plan" spikes every Feb–March, create content before it peaks.

**Step 5: Scroll down to "Related Queries"**

This is where the gold is. [These are the exact phrases people are typing into Google.](#)

Turn these into:

- Post topics
- Reel titles
- Blog headlines
- Caption hooks

Example:

- Related query: "how to get pre-approved for a mortgage"
  - Reel idea: What your lender really looks at when pre-approving you
  - Post idea: Pre-approval vs Pre-qualification: Know the Difference

**Step 6: Use "Compare" to pick stronger topics**

Click "Compare" to see which topic is more searched.

Example:

- "Variable rate mortgage" vs "Fixed rate mortgage"
  - Whichever has more search traffic is more likely to perform well on your socials.




## BRAND VOICE GUIDE

### Section 1: Define Your Brand Identity

*(Check the box that best fits your goal)*

- The Friendly Guide – Approachable, supportive, and easy to talk to
- The Expert Advisor – Professional, knowledgeable, and data-driven
- The Problem-Solver – Creative, strategic, and solution-oriented
- The Financial Coach – Educator, mentor, and trusted resource
- The Community Connector – Relationship-focused and people-first
- Other: \_\_\_\_\_

 **Tip:** Describe yourself in one sentence ➔ *Example: "I help first-time homebuyers feel confident about their mortgage decisions by providing expert guidance with a personal touch."*

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### Step 2: Develop Your Brand Voice & Tone



**How do you want clients to feel when they interact with your brand? (Choose up to 3!)**

- Confident
  - Empowered
  - Educated
  - Reassured
  - Inspired
  - Informed
  - Supported
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**What tone best represents your brand? (Choose up to 2!)**

- Professional but friendly
- Authoritative and expert-driven
- Conversational and engaging
- Fun and lighthearted
- Motivational and inspiring

**Write one sentence in your brand voice, ie; explaining mortgage pre-approval to a client:**

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### **Step 3: Key Messaging Framework**

- **Your Elevator Pitch:** (One sentence that summarizes who you help and how!)



- Example: "I specialize in helping self-employed individuals and first-time buyers secure the right mortgage with ease and confidence."
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- **Your Brand Tagline:** *(A short phrase that sums up your unique value!)*

- Example: "Stress-Free Mortgages. Expert Guidance."
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- **Three Core Messages Your Audience Should Always Remember About You:**

- 1.
- 2.
- 3.

- **Words & Phrases to Use Frequently:** *(What represents your brand best?)*

- Example: "Smart home financing," "personalized mortgage solutions," "secure your dream home"

- 1.
- 2.
- 3.

- **Words & Phrases to Avoid:** *(What doesn't fit your brand voice?)*

- Example: "Cheap mortgage," "one-size-fits-all financing," "we guarantee approval"

- 1.
  - 2.
  - 3.
- 

#### **Step 4: Consistency Across Platforms**

*How will your brand voice sound across different channels? (Fill in the blanks!)*



- **Social Media**

- *(Example: "I want my social media content to feel conversational and educational while providing real, actionable advice.")*

"I want my social media content to feel \_\_\_\_\_ and \_\_\_\_\_ while providing \_\_\_\_\_."

- **Email & Client Communication**

- *(Example: "My emails will be professional but still warm and approachable.")*

"My emails will be \_\_\_\_\_ but still \_\_\_\_\_ and \_\_\_\_\_."

- **Website & Marketing Materials**

- *(Example: "My website should make visitors feel confident and help them take the next step in their mortgage journey.")*

"My website should make visitors feel \_\_\_\_\_ and help them \_\_\_\_\_."

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### Step 5: Real-Life Application

Rewrite the following sentences in YOUR brand voice!

- “Call me today for your mortgage needs.”

Your Rewrite:

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- “Rates are changing, don’t miss out!”


Your Rewrite:

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- “Apply now for fast mortgage approval

Your Rewrite:

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 **Tip:** Stick to this branding and voice to maintain consistency! Practice with as many sentences as you need to feel clear in your voice.

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