

# HOW TO MARKET YOURSELF & CONNECT WITH LEADS BEYOND SOCIAL MEDIA

*A complete outreach and partnership guide for Mortgage Agents*

---

## HOSTING IN-PERSON & VIRTUAL EVENTS

### Why it works:

Hosting events positions you as a local expert and gives potential clients a low-pressure way to learn, ask questions, and get to know you. It builds trust, generates leads, and strengthens partnerships when done consistently.

### How to Host an In-Person Event:

#### Step 1: Choose a Topic

- "Buying Your First Home in 2024"
- "Understanding Pre-Approvals"
- "Fixed vs Variable — Which Is Right for You?"

#### Step 2: Find a Venue

- Public libraries, coffee shops, community centres, or coworking spaces
- Partnering with a real estate office, law firm, or staging company

#### Step 3: Reach Out to Co-Hosts or Sponsors

"Hi [Name], I'm planning a free local info session to help buyers understand their mortgage options. I'd love to partner with someone in [industry] who shares a client-first approach. Would you be open to co-hosting or providing space? I'd be happy to promote your business during the event and in our marketing materials."

#### **Step 4: Set Up RSVP System**

- Use Eventbrite, Google Forms, or Partiful

#### **Step 5: Promote the Event**

- Weekly social posts, Stories countdowns, personal DMs to past clients
- Ask your co-hosts to share it too

#### **Step 6: Day-Of Tips**

- Bring handouts (e.g. Mortgage Readiness Checklist)
- Have a clipboard or iPad to gather names/emails
- Keep the event to 60 minutes max

#### **After the Event:**

- Send a thank-you email with recap and CTA
- Post photo/quote recap, tag collaborators
- Add attendees to CRM and send a follow-up email within a week

#### **How to Host a Virtual Event:**

- Use Zoom or Google Meet
  - Same topic and structure as in-person
  - Consider co-host or interview format
  - Record and reuse for social/email
  - Promote through Instagram, email, and Eventbrite
-

## REACHING OUT TO GUEST SPEAKERS

### Why it works:

Bringing in professionals from adjacent industries provides extra value for your audience and positions you as resourceful and well-connected.

### Who to Approach:

- Realtors
- Lawyers
- Home stagers
- Home inspectors
- Appraisers
- Insurance brokers
- Credit specialists

### Script to Invite a Guest Speaker:

“Hi [Name], I love what you’re doing in [their industry]. I’m putting together a short online event on [topic] and I think your expertise would add a ton of value to the conversation. It’s casual, educational, and a great way to introduce both of us to more local buyers. Would you be open to co-hosting it with me?”

### Tips:

- Keep it 30–45 minutes
  - Use Canva or Google Slides
  - Give them a chance to promote themselves too
  - Record the session and send out a replay
-

## BUILDING MORTGAGE-ADJACENT REFERRAL NETWORKS

### Why it works:

Being surrounded by trustworthy professionals builds your credibility and expands your lead sources.

### How to Start:

- Make a list of potential partners
- Reach out for a 15-min coffee or Zoom

### Script:

“Hi [Name], I work in the mortgage space and love getting to know other professionals who support homebuyers. I’m building a small referral network of people I can confidently send my clients to — and I’d love to learn more about how you work. Would you be open to a quick coffee or Zoom?”

### People to Include:

- Realtors
- Home stagers
- Appraisers
- Inspectors
- Insurance brokers
- Lawyers
- Movers and contractors

### Follow-Up:

- Add to CRM with a “partners” tag
- Touch base quarterly
- Invite them to collaborate
- Offer to refer them too

## STAYING CONNECTED WITH PAST CLIENTS, FRIENDS, AND FAMILY

### Why it works:

People refer who they remember. Staying connected means finding authentic, low-pressure ways to show up in people's lives — especially when you're not trying to sell anything.

### Opportunities to Reach Out & Stay Connected:

- Share a quick tip, helpful resource, or market update
- Let your network know about interesting local happenings (“New cafe just opened near [neighbourhood] — first 10 replies get a \$5 coffee card on me!”)
- Highlight new programs or rule changes (“New CMHC rule just dropped — want a plain-English version? Happy to share.”)
- Offer a seasonal check-in or invitation to ask questions (“If you’re wondering whether to lock in or ride it out, I’m happy to offer a no-pressure second opinion.”)

### Scripts:

#### Past Client:

“Hi [Name], I hope you’re loving your home! I was just thinking about you and wanted to check in. If you ever have questions about rates or plans, I’m just a message away.”

#### Friends/Family:

“Hey [Name], I know this isn’t work talk, but if you know anyone looking for advice on buying or renewing, feel free to send them my way. I promise — no pressure, just clear answers.”

#### Birthday Message:

“Happy Birthday [Name]! Wishing you an amazing year ahead. If there’s ever anything I can do to support you or someone you care about — in life, mortgages, or beyond — you know where to find me.”

**Webinar or Event Invite:**

“Hi [Name], I’m hosting a short, free online session this week on [topic]. Thought of you because it might be helpful — no pressure to join, but I’d love to send you the link if you’re curious.”

**Other Touchpoints:**

- Mortgage anniversaries: “Congrats — it’s been a year! Still in love with your rate?”
  - Client appreciation gestures: A random \$5 coffee card “just because” can go a long way
  - Seasonal newsletters with valuable tips (not sales blasts)
  - Invite them to co-create content: “What’s one thing you wish you knew before you bought your home?” (turn it into a post and tag them!)
-

## CREATING “TAKE-HOME” VALUE FOR ATTENDEES

### Why it works:

Giving attendees something to take home — physically or digitally — extends the impact of your event, keeps you top of mind, and gives them a reason to follow up.

### Free Digital Take-Home Ideas:

- Mortgage Readiness Checklist
- First-Time Buyer Budgeting Template (Google Sheet)
- Rate Tracker & Planning Tool
- Mini eBook: “5 Mistakes First-Time Buyers Make”

### How to deliver:

- Email it the day after your event with a thank-you
- Offer it as an RSVP bonus
- Share via QR code during the session

### Simple Physical Incentives:

- Branded pens, folders, notebooks
- Coffee cards or door prize draws
- Printed one-pagers (Glossaries, Timelines)
- Referral cards (“Know someone buying? Pass this along.”)