

5-Step Power Plan for Growth-Oriented Mortgage Loan Officer



Goal of the Plan is to **increase leads**, **credibility**, and **authority** quickly with minimal time and resources.

WEBSUM

Table of Contents

- Step 1: Ask Recent Clients for Google Reviews 3
- Step 2: Add a Booking / Appointment Button to GMB 4
- Step 3: Post a Quick Market Update on GMB 5
- Step 4: Share a Buyer Success Story on Social Media 6
- Step 5: Post a Document Checklist Graphic 7
- Why This Plan Works..... 8
- GMB Management Done-For-You 8

Each step shares three things:

- 1. What to do
- 2. Why this works
- 3. Resources required.

Step 1: Ask Recent Clients for Google Reviews

WHAT TO DO

Send a quick text or email message.

“Hey! Quick favor — Would you mind leaving a short review on my Google profile? It helps me reach more families. Here’s the link, thank you!”

WHY THIS WORKS

It boosts GMB visibility, trust, and conversion.

REQUIRED RESOURCES

- GMB review link
- Client contact list
- Short script

Step 2: Add a Booking / Appointment Button to GMB

WHAT TO DO

Enable the “Book Appointment” button and link to Google Calendar, Calendly, or another scheduler.

WHY THIS WORKS

Converts profile visitors into appointments **instantly**, capturing warm leads.

REQUIRED RESOURCES

- GMB dashboard access
- Scheduling tool link.

Step 3: Post a Quick Market Update on GMB

WHAT TO DO

Write 1–2 sentences about rates or local mortgage trends:

“Rates moved slightly today. Even a small shift can affect your buying power. DM me for details specific to you.”

WHY THIS WORKS

Shows authority, encourages inquiries, keeps GMB active.

REQUIRED RESOURCES

- Rate source
- Phone / computer
- Short post

Step 4: Share a Buyer Success Story on Social Media

WHAT TO DO

Post a short, anonymized story about a recent closing:

“Congrats to our buyer on closing their first home in 21 days! Here’s how we helped...”

WHY THIS WORKS

Builds social proof, trust, and inbound leads.

REQUIRED RESOURCES

- Client info
- Photo / graphic
- Smartphone / computer

Step 5: Post a Document Checklist Graphic

WHAT TO DO

Create a simple graphic with documents buyers need for pre-approval such as pay stubs, tax returns, forms of identification, bank statements, etc.

WHY THIS WORKS

Provides value, answers questions they haven't even asked yet, primes buyers, increases engagement and shares.

REQUIRED RESOURCES

- Canva
- PowerPoint

Why This Plan Works

- Primarily because of its simplicity.
- It combines **credibility** (reviews), **lead capture** (booking button), **authority** (market update), and **social proof** (success story + checklist).
- Every action is **fast, actionable, and high-ROI**.
- It requires minimal time on your part.
- It can be repeated weekly for compounding results.

GMB Management Done-For-You

Would you like your GMB profile managed for you?

Our Easy, Done-For-You option, lets you be 100% worry-free for **just \$249 a month** (plus we offer an unexpected surprise).

If this is the right option for you, [click this link](#) to fill a Google form with your name, phone number & email, and we'll reach out to explain our process.