

Awareness Strategy Checklist for Mortgage Professionals

Choose the strategy that best matches your style.

IT'S YOUR RESPONSIBILITY TO ENSURE YOUR MARKET KNOWS WHO YOU ARE!

AWARENESS STRATEGY CHECKLIST
for Mortgage Professionals

YOUR PROSPECTS JUST DON'T KNOW YOU YET!

💡 WHY THIS MATTERS:
If you are not doing the amount of business you want, the first thing to check isn't your rates - it's your **awareness**.

- If you're doing none of these, and you're frustrated with your results... your problem is simple: it's you.
- If you're doing some, but not seeing traction—you may just need to tweak your strategy and get some guidance.
- If you say you're doing all of these... we don't believe you 🤔

📋 THE AWARENESS STRATEGY MENU
(Pick one or a few of these that match your personality and energy and commit!)

Strategy	Pros	Cons	Personality Fit
SEO (Local & Blog)	Long term organic traffic, high intent	Slow ramp-up, needs content consistency	Writers, long game thinkers
LinkedIn	Great for targeting professionals	Easy to ghost your feed, needs engagement	2BB networkers, thought leaders
Instagram / Facebook	Social reach, community feel	Algorithm volatility, content burnout	Visual storytellers, daily sharers
YouTube	Builds authority, long shelf life, people go here to learn	High effort upfront (video planning)	Teachers, explainers, detail-driven pros
Google Ads	Fair visibility, high intent	Can be expensive if unmanaged	Data-driven marketers, lead chasers
CMS & Reviews	Boosts local credibility	Needs ongoing request system	Relationship builders, local pros
Events (first time buyer, networking, etc.)	High trust, direct interaction	Time-consuming to plan	Connectors, educators
Referral Partners	High-quality leads	Relationship nurturing takes time	Networkers, deal-makers
Email Marketing	Scalable, easy to automate	Needs consistency and a list	Planners, nurturers, CRM lovers
Radio	Mass local reach, brand building	Expensive, hard to track ROI	Big personalities, local radio
Podcasts (host or guest)	Builds authority, niche audience	Slow growth, prep-heavy	Experts, conversationalists
Open Houses	Face-to-face lead potential	Depends on agents, hard to scale	Hosts, weekend warriors
Referrals (past clients)	Warmest leads possible	Need a system to ask	Relationship-first originators
Mail (postcards, letters)	Tangible, memorable	High cost per lead	Creative marketers, local specialists
TikTok	Huge reach, even starter accounts get can get huge reach	High effort upfront (video planning)	Visual storytellers, daily sharers
Teaching Classes to Referral Partners	Positions you as an expert, builds deep trust, creates strong referral ties	Takes prep time, not scalable without recording, may require public speaking confidence	Educators, relationship-builders, confident presenters, detail-oriented pros

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Strategy	Pros	Cons	Personality Fit
SEO (Local & Blog)	Long-term organic traffic, high intent	Slow ramp-up, needs content consistency	Writers, long-game thinkers
LinkedIn	Great for targeting professionals	Easy to ghost your feed, needs engagement	B2B networkers, thought leaders
Instagram / Facebook	Broad reach, community feel	Algorithm volatility, content burnout	Visual storytellers, daily sharers
YouTube	Builds authority, long shelf life, people go here to learn	High effort upfront (video planning)	Teachers, explainers, detail-driven pros
Google Ads	Fast visibility, high intent	Can be expensive if unmanaged	Data-driven marketers, lead chasers
GMB & Reviews	Boosts local credibility	Needs ongoing request system	Relationship builders, local pros
Events (first-time buyer, networking, etc.)	High trust, direct interaction	Time-consuming to plan	Connectors, educators
Referral Partners	High-quality leads	Relationship nurturing takes time	Networkers, deal-makers
Email Marketing	Scalable, easy to automate	Needs consistency and a list	Planners, nurturers, CRM lovers
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Open Houses	Face-to-face lead potential	Depends on agents, hard to scale	Hustlers, weekend warriors
Referrals (past clients)	Warmest leads possible	Need a system to ask	Relationship-first originators
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TikTok	Huge reach, even starter accounts get can get huge reach	High effort upfront (video planning)	Visual storytellers, daily sharers
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NO MATTER WHAT STRATEGY YOU CHOOSE

Your content, ads, and conversations should always lead people back to your website to:

- Learn more and do research
- Interact with tools and calculators
- Download helpful guides
- Book a call or apply online

💡 Your website is your digital storefront—use it as your online HUB for people who are researching you.



AFTER AWARENESS COMES FOLLOW UP

Awareness without follow-up = wasted effort.

Once they've visited your site or engaged with you, keep the conversation going with:

- Email marketing drip campaigns
- Retargeting ads (social & Google)
- Text campaigns (if appropriate)
- Calendar booking links
- Lead magnet downloads with ongoing nurture



ACTION STEP

Choose 2–3 awareness strategies that match your personality and start building consistent habits around them.

Not sure which to focus on? Start with your strengths, then look at your market.

If you do some of these, and are not happy with your results, it may just be a strategy problem and some coaching and redirection could be all you need. We can help direct you to mortgage specific coaches if you want recommendations.

💡 YOUR WEBSITE IS YOUR DIGITAL
STOREFRONT—IF IT'S WEAK, YOU'RE
MISSING OPPORTUNITIES.

NEED A SOLID WEBSITE TO SUPPORT ALL OF THIS?

THAT'S WHERE [VONKDIGITAL.COM](https://vonkdigital.com) COMES IN.

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