

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the left and right sides of the slide, framing the central text. The overall aesthetic is clean and professional.

# Mastering Your NICHE and OFFER

Mortgage Broker Digital Marketing Strategy - Module 1

## Master your NICHE and your OFFER

In this module you will learn how to identify and articulate

- ▶ Your NICHE target is
- ▶ The type of loans that you want to sell through this campaign
- ▶ The services that you provide
- ▶ How your products/services change the life of your target
- ▶ Use of the digital snapshot



## Who are we targeting and what we are selling them?

- ▶ We are not trying to sell a home loan to anyone who wants one
- ▶ We are looking for a specific type of enquirer who fits the profile that we create
- ▶ We are trying to solve a problem for someone who has one by the application of our service or product.



## Using four sheets of paper write the following at the top of each page

- ▶ 1. My A and B clients
- ▶ 2. What does my business sell?
- ▶ 3. Who is my target?
- ▶ 4. How does the life of my target change when they buy what my business sells?



# Page #1

## My A and B clients

- ▶ List the surnames of the last 5 to 10 clients that you have written.
- ▶ Next to each apply an A or B beside their name.
- ▶ Make the assessment on the ratio of time spent with the client vs money earned plus future opportunity
- ▶ Identify A clients as the type you would be happy to clone
- ▶ Identify B clients as the type you may want to avoid
- ▶ Looking at the two lists see if you can identify any patterns or commonalities that occur amongst the A's and the B's and note them down.





# Page #1

## My A and B clients

- ▶ Common identifiers for A clients will be
- ▶ Clear on direction
- ▶ Developed a high level of trust
- ▶ Truly wanted and appreciated being led through the transaction
- ▶ The age group will be in a 10 year range
- ▶ Their outlook to life and what they want to achieve will be common
- ▶ They will have a very clear picture of their goal and what they want to achieve
- ▶ They will value your assistance
- ▶ Had supporting documents available



## Page #1

# My A and B clients

- ▶ Common identifiers for B clients will be
- ▶ Not clear on what they wanted to achieve
- ▶ Were more willing to shop around
- ▶ Sometimes evasive and closed early in the interaction
- ▶ They were not bound by a particular deadline
- ▶ Didn't warm to your persona
- ▶ Wanted to double guess your suggestions
- ▶ Supporting documents were harder to obtain
- ▶ Required more appointments



## Important understandings

- ▶ A type clients are more likely to be attracted through your specific campaign
- ▶ A type clients will allow you to apply your full suite of value adds
- ▶ A type clients have done a significant amount of think work prior to making contact with you
- ▶ B type clients want you to operate outside the parameters of how you wish to meter out your service
- ▶ B type clients will be sceptical of your service offering
- ▶ B type clients take more time to convert and are less likely to refer
- ▶ There are just as many A type clients as there are B type clients in your marketplace





## Page #2

# What does my business do/sell?

- ▶ Make a list of all the things that your business sells
- ▶ Examples include
- ▶ Investment home loans, refinancing loans, commercial loans, car loans, asset finance, financial problem-solving, funding tax debts, funding of holidays, funding of renovations, fund education, construction loans, first home buyers
- ▶ List at least 10 products that your business sells
- ▶ Isolate the 3 that you like selling the most based on profit and expertise/knowledge



## Page #3

### Who is my target - referring back to page #1

- ▶ List the 10 key characteristics of my A clients
- ▶ Level of complexity is high
- ▶ Age range
- ▶ Referred by someone else
- ▶ Hunger for answers - having an answer now is important
- ▶ Want of a personalised service rather than being a number
- ▶ Income ranges - high
- ▶ Ambitious - keen to create wealth
- ▶ Willingness to be informal but can monetise my value
- ▶ Time poor
- ▶ Person of influence
- ▶ Motivated to move forward
- ▶ Note the 3 most common characteristics of your A clients



## Page #4

# How does what you sell change the lives of the people who buy it?

- ▶ List 10 outcomes of how your product and service adds value
- ▶ Examples could be
- ▶ Instils confidence in the future
- ▶ Generates second stream of income
- ▶ Quality of life improves
- ▶ Accelerates time frame in quest for achieving goal
- ▶ Gives peace of mind
- ▶ Alignment of goals with reality
- ▶ Secures a positive outlook
- ▶ Puts a smile on people's faces
- ▶ Put people on the path to where they want to go
- ▶ Allows them to get on with other important tasks



## Important notation

- ▶ We are in the business of people's emotions
- ▶ We must tap into the thought processes of clients that occur prior to them meeting us
- ▶ All of their thoughts are hidden and our goal is to bring them out
- ▶ The emotions that we want to evoke through our campaign and through the application of our service are;
- ▶ Relief, happiness, clarity, security, confidence, a defined sense of purpose
- ▶ We are in the life changing business
- ▶ Our campaign must communicate - do you want these outcomes?





## Now to establish our client NICHE and what we will be SELLING them

- ▶ Look across your four pages
- ▶ Note your preference of the three products that you sell
- ▶ Note your three common attributes noted about you're A type clients
- ▶ Note your four most outstanding life changes
- ▶ Create mission sentence



## My campaign mission sentence

- ▶ I sell (product) to people who (list three attributes) and when I do their life changes because they (list four outstanding changes)
- ▶ We will use this information for the creation of our Facebook ad in Module #2



## Creation of digital snapshot

- ▶ Go to [http://bit.ly/Smartphone\\_link\\_order](http://bit.ly/Smartphone_link_order)
- ▶ Populate the form and click submit
- ▶ Include the invoice number that you received on your Shopify order which is noted on the invoice that you received after you placed your order.



## Summary of module #1

- ▶ We identified that when we help people to get what they want, you get what you want.
- ▶ We identified what makes an A and B client different
- ▶ We have learned how to articulate;-
- ▶ Our product and what we sell
- ▶ Who our target is
- ▶ How their lives change as a result
- ▶ Identified our NICHE client and the product/service that we will sell to them
- ▶ Spend time analysing what you have written on your four pages
- ▶ Next Module - #2 we will be creating your Facebook ad, your personal website and landing page, video hosting package, and online calendar. Direct email campaigns.

