

# Tips & Tricks For LOs

**Follow Essex Mortgage's social media pages/accounts**  
Repost our content!

**Find groups on Facebook to learn from**  
LO groups, RE Agent groups, Homeowner groups, Groups for communities that you serve

**Learn from other Essex Mortgage LOs**

Schedule calls with top producers and pick their brains

**Utilize The Path to your advantage**

**Keep borrowers updated throughout the entire home buying/refinance process**

**Create your own content (Posts, Stories, Blogs, etc.)**

- Be active on Facebook and Instagram
- Make content useful for your target audience
- Engage with realtors online
  - follow them, comment on their posts, like their posts
- If you have questions reach out to [marketing@essexmortgage.com](mailto:marketing@essexmortgage.com)
- Respond to all comments

**Reach out to friends, family, and any other contacts you have for referrals or for business**

**Familiarize yourself with the platforms we use**

- SF, SN, MRE, Experience, Encompass
- Many of these platforms have tutorials on their website to help you learn the ins and outs of the features and services that are offered
- Go on youtube and watch tutorials

**Seek to get reviews from your borrowers!**

**If you haven't already, create a personal bio for all of the platforms that Essex utilizes**

**Automate your marketing and communication efforts where you can**

**Take time for yourself to prevent burnout**

- Meditate
- Exercise
- Get 8 hours of sleep
- Continue to take time for your hobbies

**Utilize post it notes, google drive, mobile app. etc., to keep track of tasks that need to be completed and your daily goals**

**Follow up with your borrowers before and after closing (loan Anniversaries, birthdays, etc.)**

**Stay up to date with news in the mortgage industry**

- Subscribe to our mortgage news letter every Friday
- Read the news on sites such as Mortgage News Daily and HousingWire

**Make sure you know all of the Loan Programs we offer like the back of our hand**

**Respond quickly to any questions your borrowers may have**