



4 Point RoadMap for Next Steps

Set Goals

Set S.M.A.R.T Goals

Refer To Social Media Next Steps

5 steps to jump start your Marketing

Rule of 54

- 25 Marketing Pieces
- 25 Phone Calls
- 2 Networking Meetings
- 2 Loans Submitted

Get Quotes and Submit Loans

Contact Loan Analyst and Submit Deals to Fund



Set Goals

Specific

Measurable

Achievable

Relevant

Time Bound



Certified Private Money Broker Social Media Next Steps



1

- ↓
- Design your logo
- ↓
- Obtain a phone number
- ↓
- Obtain an email
- ↓
- Purchase Domain Name

2

- ↓
- Familiarize yourself with your membership site resources
- ↓
- Download and edit/brand your documents

3

- ↓
- Create your squeeze page
- ↓
- Create your website

4

- ↓
- Create a free Canva account
- ↓
- Create FB Business Page
- ↓
- Start Creating Content for your Business Page

5

- ↓
- Create/update Personal LinkedIn Page
- ↓
- Create Linked In Business Page
- ↓
- Start Creating Content for your Business Page

Step 1 Breakdown

1

Design your Logo

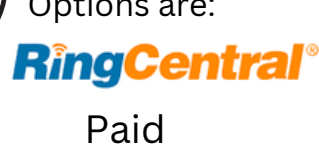
Options to create Logo are:



2

Obtain a phone number

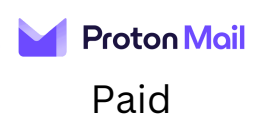
Options are:



3

Obtain an Email

Options are:



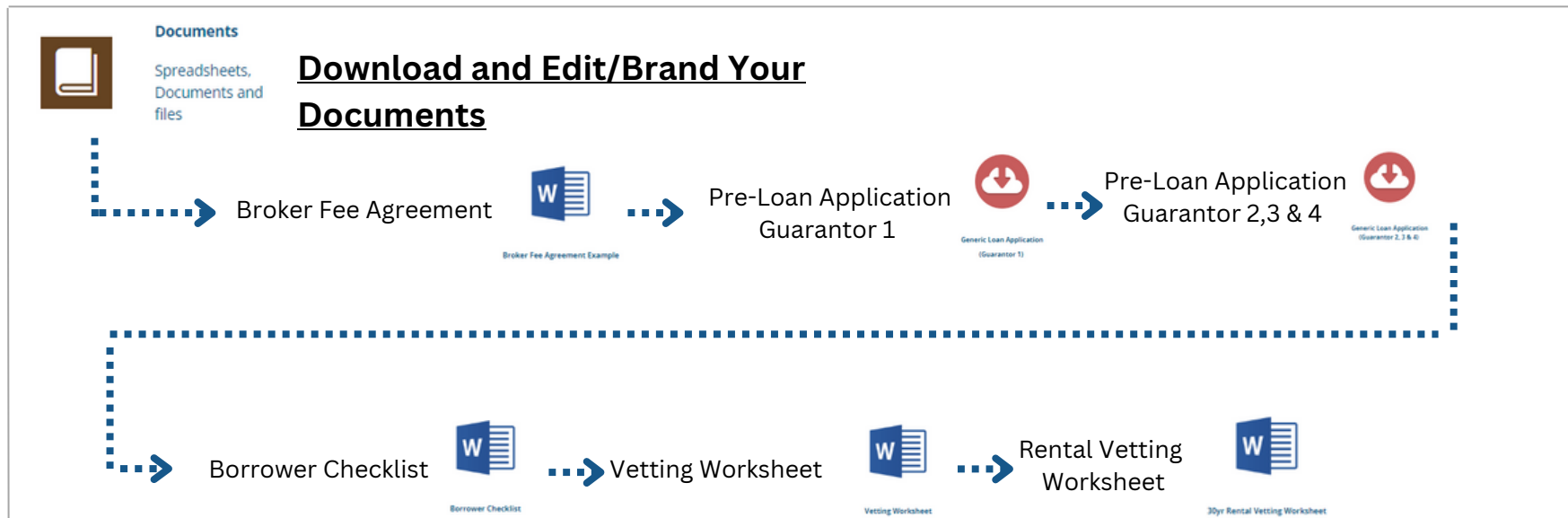
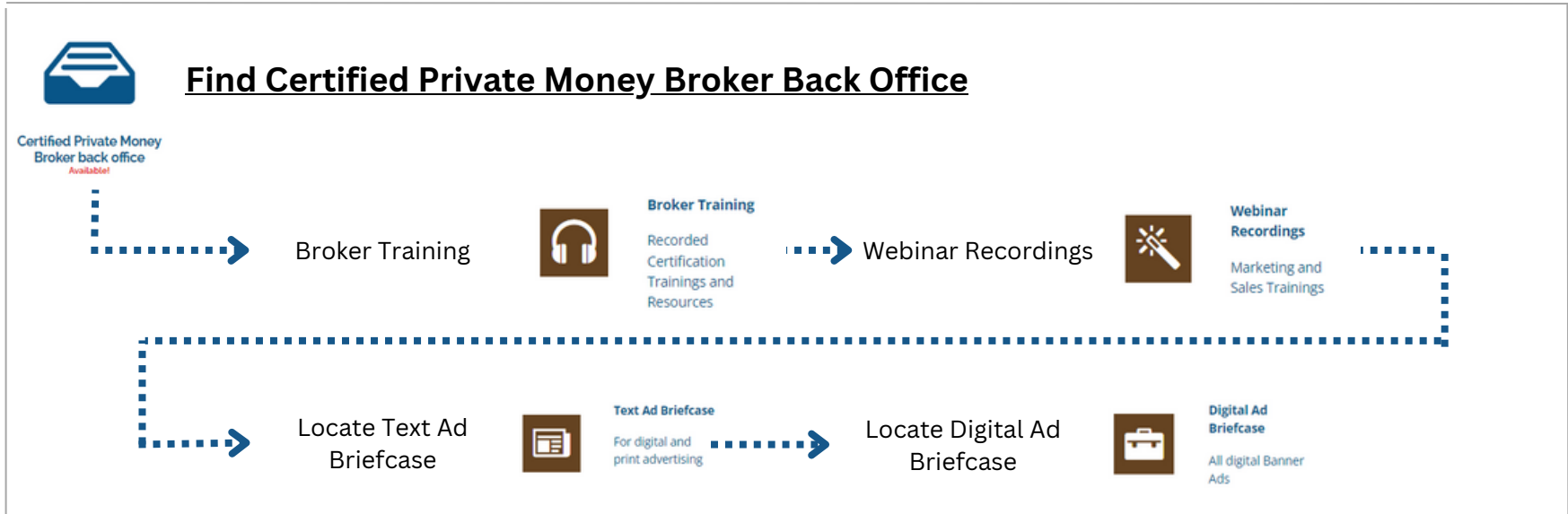
4

Purchase domain name

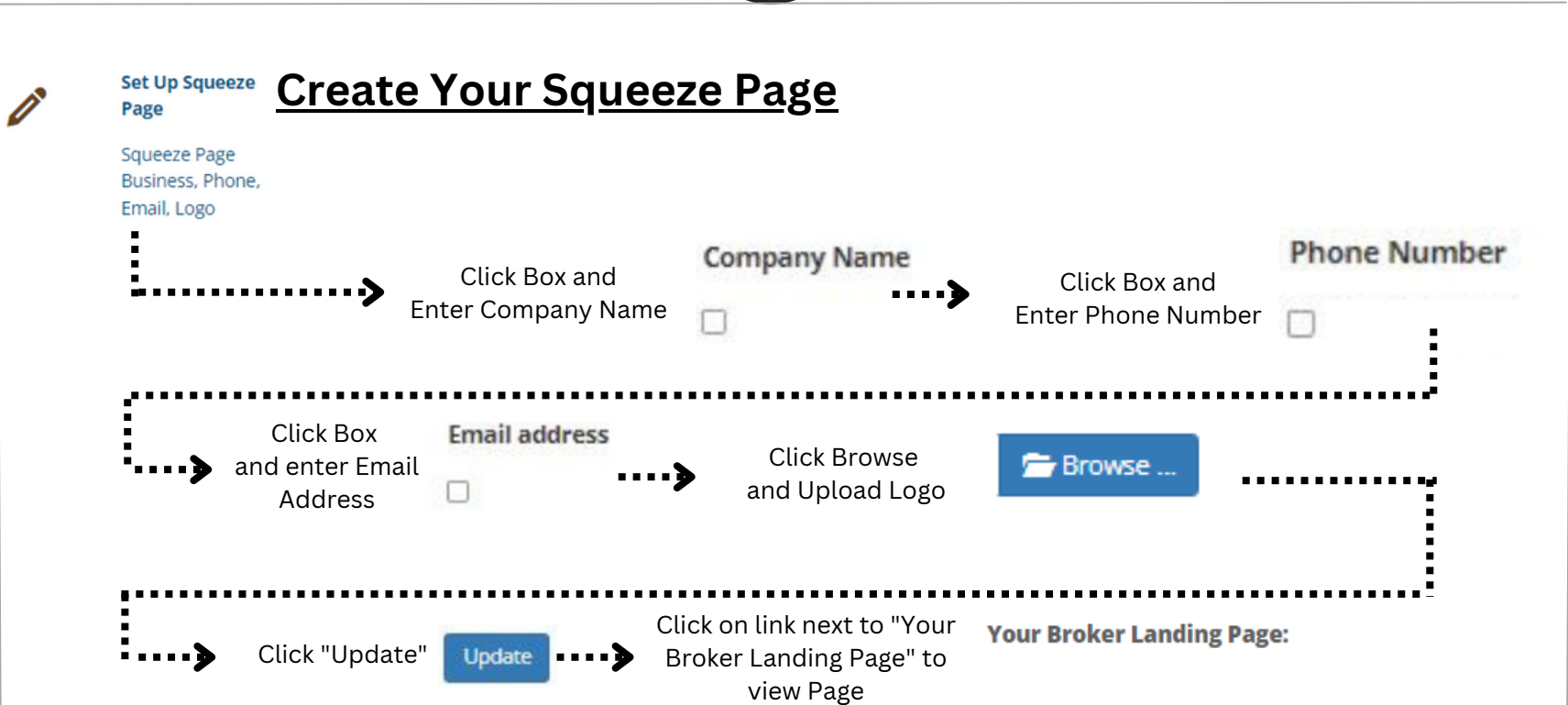
Options are:



Step 2 Breakdown



Step 3 Breakdown



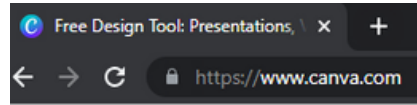
Create Your Website



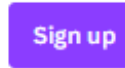
Step 4 Breakdown

Create Your Free Canva Account

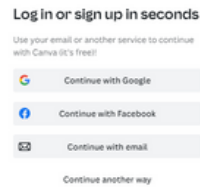
Go to www.canva.com



Click on "Sign up"

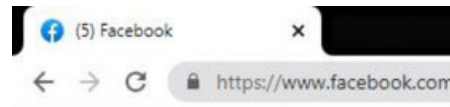


choose your sign up method

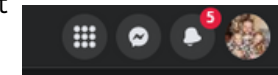


Create Your Facebook Business Page

Go to [www.Facebook.com](https://www.facebook.com)



Find these 4 circles at the top right of your screen



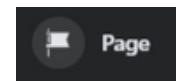
Click on "Menu" Icon



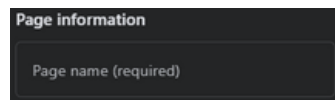
Find the "Create" Menu



Click on "Page" Icon



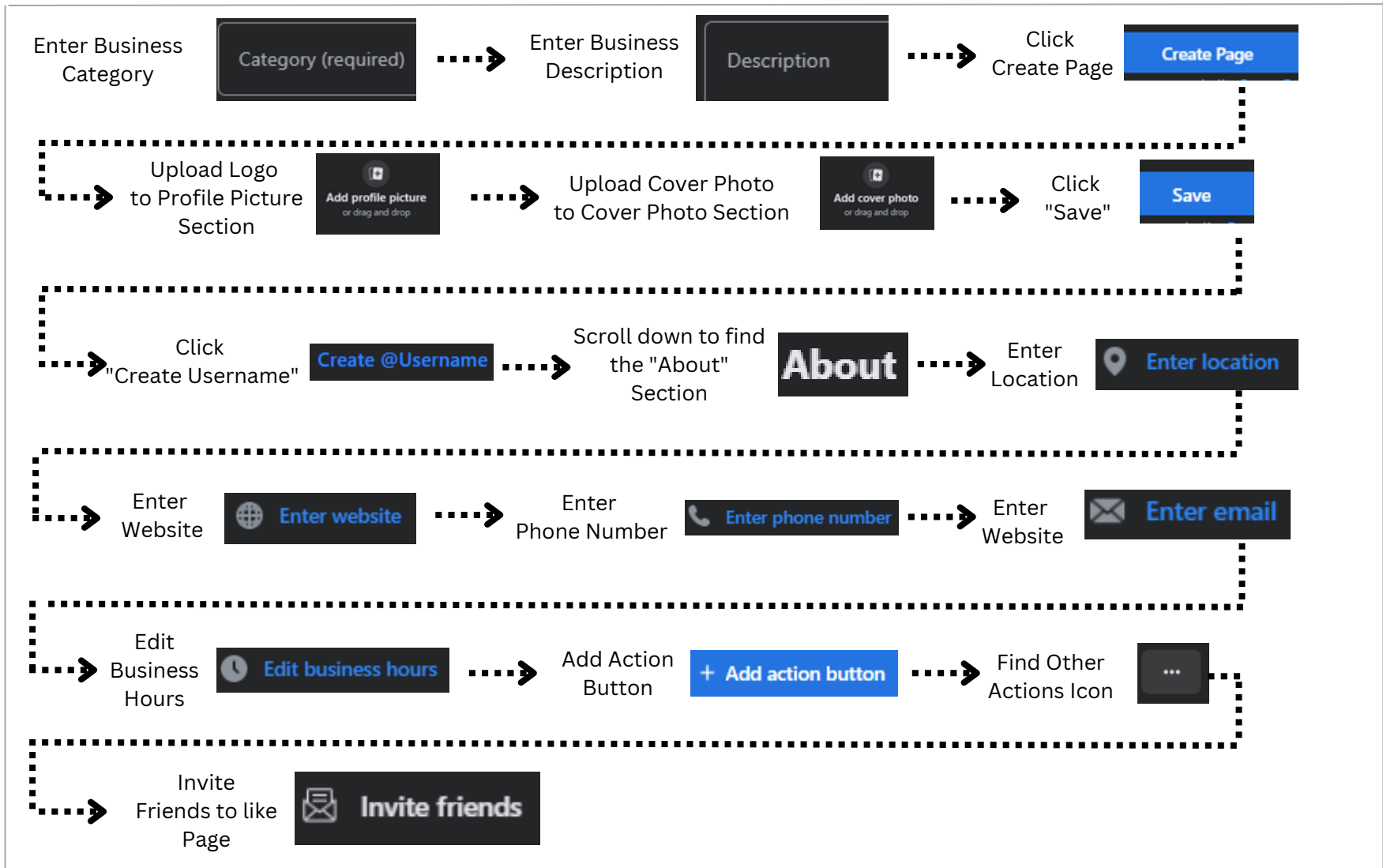
Enter Business Name



Continued on page 7

Step 4 Breakdown

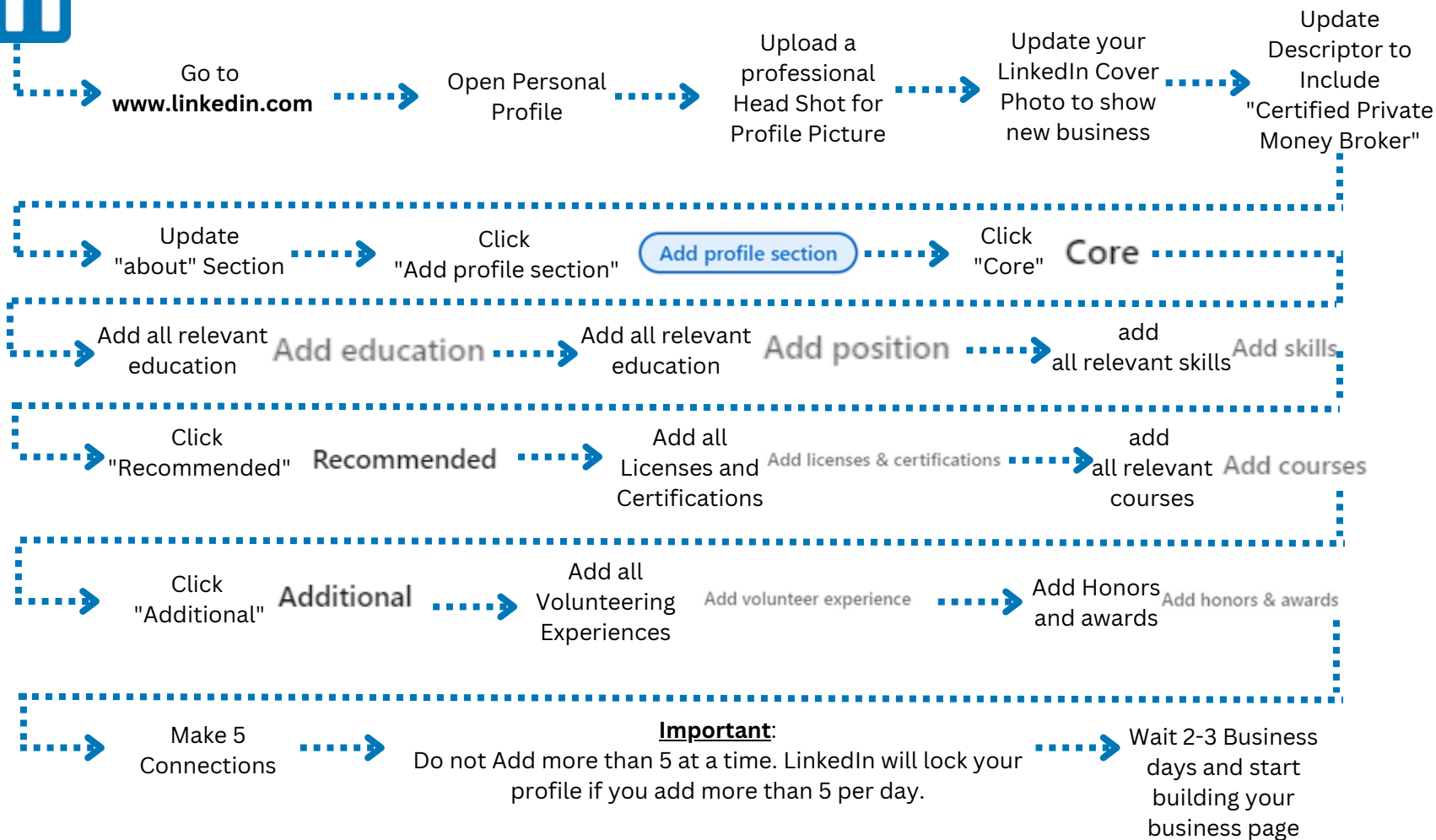
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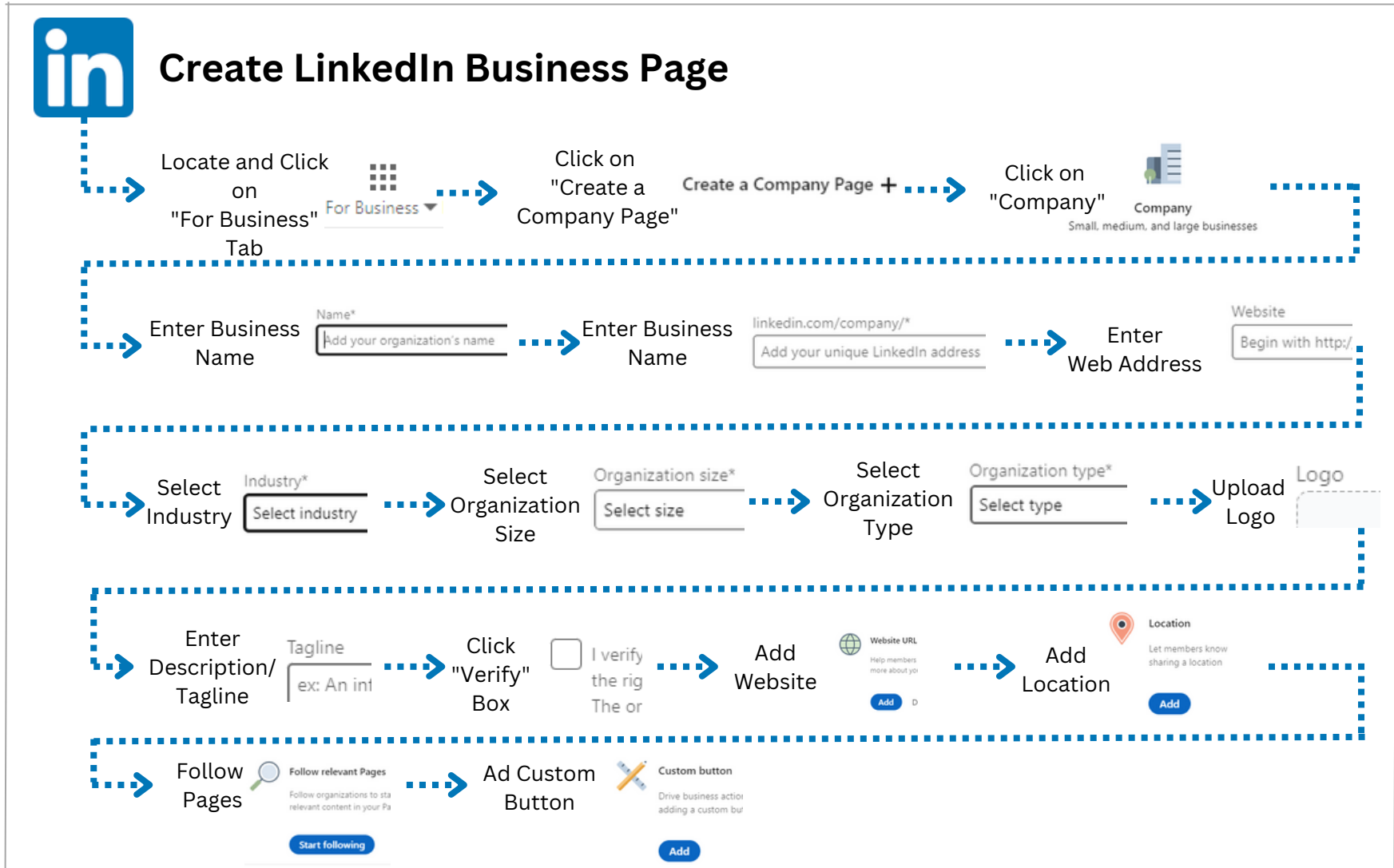
Step 5 Breakdown



Create/Update Your Personal LinkedIn Page



Step 5 Breakdown Continued



Rule of 54

25

Marketing Pieces

25

Phone Calls

2

Networking Meetings

2

Loans Submitted



Get a Quote and Submit Loans



Option 1

Call 800-473-6051 and ask for a Loan Analyst

Option 2

