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How Mortgage Brokers can Leverage ChatGPT for Marketing Success

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Introduction

Welcome to the future of marketing for mortgage brokers. At Connective, we understand that the world of finance is evolving at an unprecedented pace, driven by technological advancements that are reshaping how we conduct business. In this dynamic environment, staying ahead of the curve requires more than just traditional methods—it demands innovation, agility, and the ability to harness cutting-edge tools that can propel your business forward.

This guide will show you how to unlock the full potential of ChatGPT for your business. From crafting engaging social media posts to writing compelling referral letters, creating informative blog posts, and designing targeted email campaigns, ChatGPT can assist you in every aspect of your marketing strategy. But this is more than just a tool for creating content; it's a partner in helping you understand your clients better, respond to market trends more quickly, and ultimately, close more deals.

As you embark on this journey with us, remember that the future of mortgage broking is not just about adopting new technologies but about embracing a mindset of continuous learning and innovation. At Connective, we are here to support you every step of the way, providing you with the tools, resources, and expert guidance you need to thrive in an increasingly digital world.

Let's get started!

# Chapter One

What is ChatGPT and how can it help your business?

Before we jump into how to use ChatGPT, let's start with the basics. In this chapter, we'll explain what ChatGPT is in simple terms and explore how it can be a powerful tool for your mortgage broking business. Whether you're looking to save time, boost your marketing efforts, or improve communication with clients, ChatGPT can help.
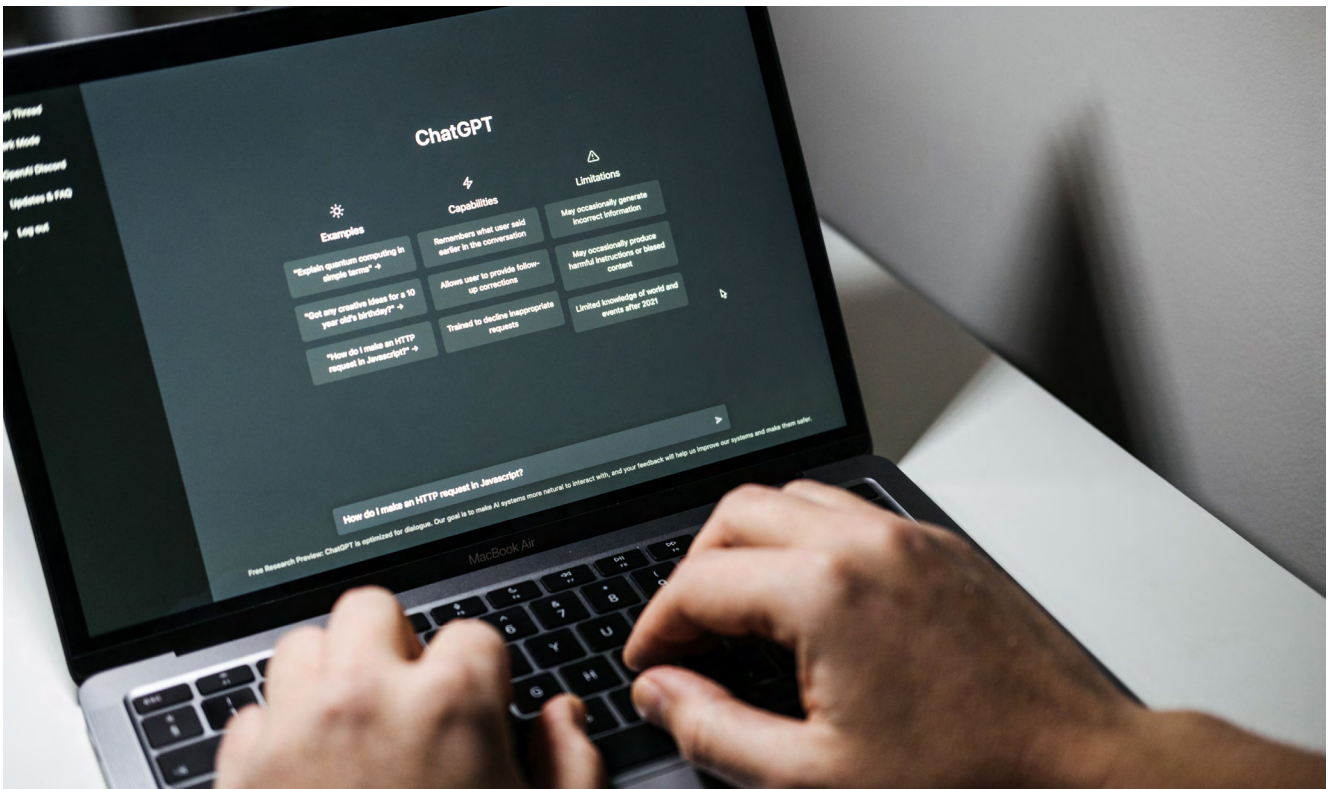
1.1 Understanding ChatGPT

What is ChatGPT?

ChatGPT is a type of artificial intelligence (AI) known as a large language model (LLM) that can understand and generate natural language text. Think of it as a digital assistant that understands language and can generate text for you. Whether you need to draft an email, write a social media post, or create a blog article, ChatGPT can do it quickly and easily.

How does ChatGPT work?

You type in a request, and ChatGPT responds with text that fits your needs. It's trained on a lot of different types of language, so it can handle everything from professional emails to creative marketing copy. The best part? You don't need to be a tech expert to use it—just type what you want, and ChatGPT does the rest.

1.2 Why ChatGPT is useful for mortgage brokers?

Now that you know what ChatGPT is, let's talk about why it's useful for you as an mortgage broker.

Save time on writing tasks

As a broker, you probably spend a lot of time writing—whether it's emails, marketing materials, or reports. ChatGPT can take care of these tasks for you, so you can focus on more important things, like building relationships with clients or closing deals.

Improve your marketing efforts

Marketing is crucial for growing your business, but it can be hard to come up with new ideas or find the time to create content. ChatGPT can help you quickly generate ideas, write posts, and create other marketing materials that will attract new clients and keep your existing ones engaged.

Communicate better with clients

Clear and professional communication is key to keeping clients happy. Whether you're sending updates, explaining complex financial products, or thanking clients for their business, ChatGPT can help you craft messages that are easy to understand and effective.

1.3 Real-world examples: How brokers use ChatGPT

Let's look at a few examples of how mortgage brokers like you might use ChatGPT in everyday business:

Example 1: Writing an email

You need to touch base post-meeting. Instead of spending 15 minutes writing and editing it, you type, "Write a follow-up email to a client thanking them for our recent consultation and offering to answer any further questions they might have." ChatGPT generates a professional email in seconds that you can personalise and send.

Example 2: Creating a social media post

You want to share a quick tip about home finance on LinkedIn but aren't sure what to write. You ask ChatGPT, "Create an Instagram post educating first home buyers on the difference between fixed and variable rates." It gives you a well-written post ready to share with your followers.

Example 3: Drafting a blog post

You want to start a blog to attract more clients but don't have the time to write long posts. You type, "Write a blog post explaining eligibility for the First Home Owner Grant." ChatGPT provides a draft that you can tweak and publish on your website.

Remember:

These are simple examples of how brokers can use ChatGPT, which may generate more generic results. For more tailored and higher-quality responses, be sure to check out the prompt frameworks on pages 11 and 14 for a more strategic approach.

Chapter Two

Getting started with ChatGPT – A simple guide for beginners

Getting started with new technology can sometimes feel overwhelming, but don't worry! This chapter is designed to make it easy for you to dive into the world of ChatGPT. Whether you're completely new to AI or just looking for a straightforward way to enhance your marketing, this guide will walk you through the basics step by step.

2.1 How to start using ChatGPT

Now, let's get you set up and ready to use ChatGPT. Don't worry if you're not tech-savvy—these steps are easy to follow.

Step 1: Access ChatGPT

- **Go to the website:** The simplest way to start using ChatGPT is to open your web browser and type in the address: chatgpt.com.

- **Sign up or log In:** You'll need an account to use ChatGPT. If you don't have one yet, signing up is easy—just provide your email and create a password. If you already have an account, just log in. There is both a free and premium version of ChatGPT.

- **Available on mobile:** You can access ChatGPT from any browser across any device (computer, tablet or mobile phone). You can also download ChatGPT on App Store or Google Play.

Step 2: Navigating the platform

1. **Find the prompt text box:** Once you're logged in, you'll see a text box in the middle of the screen. This is where you can type your questions or commands, known as prompts. Once you have typed in your prompt, simply hit Enter or the black arrow key at the end of the text box. This conversation consisting of questions and responses forms a Chat.
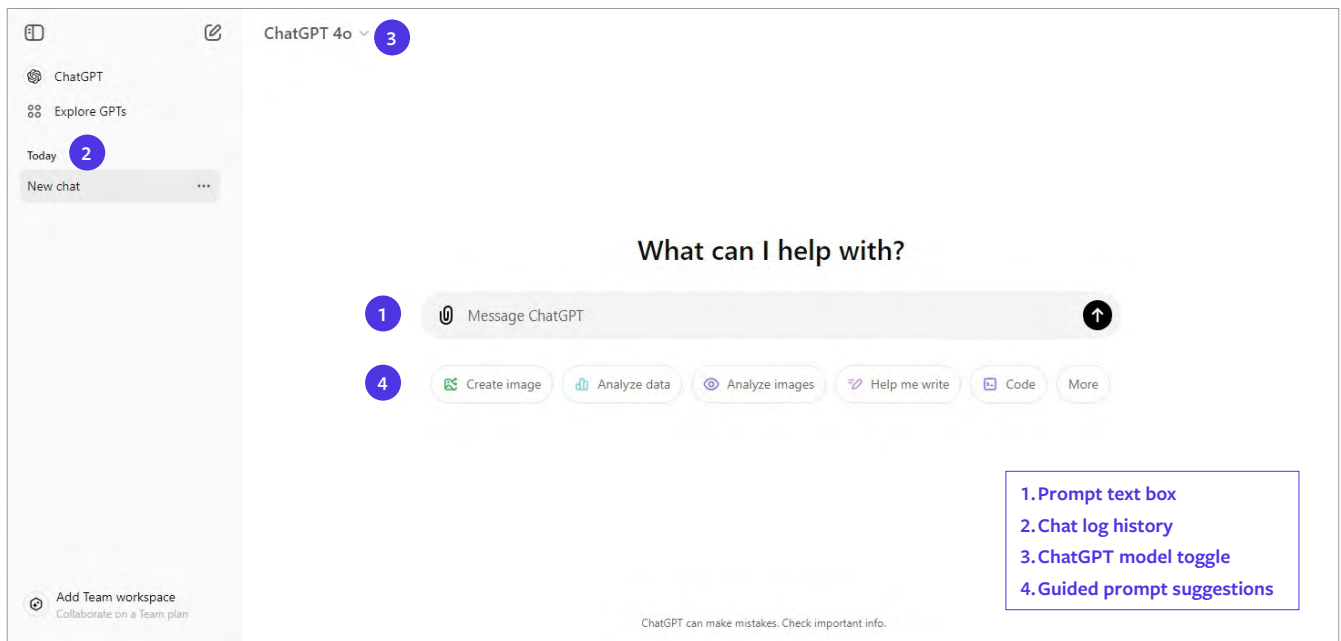
2. **View your Chat log history:** When navigating the sidebar to the left of the screen, you'll see the titles of your previous chats, starting with the newest chat at the top. ChatGPT saves your chat history and data, including the prompts (input) you give to ChatGPT, and all of its responses.

3. **Version toggle:** Advanced users can toggle the ChatGPT version being used to execute requests. Different models offer varying computational resources. For example, GPT-4o is a large-scale model, requiring significant computational resources. It's perfect for tasks demanding high precision and extensive data processing. GPT-4o Mini, on the other hand, is smaller and more resource-efficient.

4. **Guided prompt suggestions**: Below the prompt text box, there are a number of suggested ways you can interact with ChatGPT. Each offers a unique application you can explore at your own pace.

2.2 Simple tips for getting the best results

Here are some easy-to-remember tips to help you get the most out of ChatGPT

- **Be clear and direct:** When you type your prompt, be as clear and direct as possible. Instead of saying, "Write something about mortgage broking," try, "Write a 3-sentence summary of why using a mortgage broker is good for home buyers."

- **Start small:** Begin with simple tasks like writing an email or a short post. As you get more comfortable, you can try asking for more complex content like blog posts or marketing copy.

- **Use everyday language:** You don't need to use fancy words or technical jargon—just ask ChatGPT like you would ask a colleague or friend.

- **Don't be afraid to experiment**: Try out different prompts to see what kinds of responses you get. The more you experiment, the better you'll understand how to get the content you need.

- **Provide context upfront:** The more detailed background and context you provide to ChatGPT, the more accurately tailored and relevant its responses will be. By painting a comprehensive picture of your business and audience, ChatGPT will use this context across all future tasks and responses.

- **Use a framework:** Structuring your prompts ensures clarity, focus, and better context handling, leading to more accurate and efficient responses from ChatGPT. It also helps tailor the output to your specific needs, improving response quality and reducing the need for clarifications.

2.3 Basic prompt framework

Follow these easy-to-remember framework steps to help you get the most out of ChatGPT

Framework Step	Example
State the purpose	"Draft an article about what to consider when refinancing your loan."
Assign ChatGPT a role	"You are a mortgage broker"
Specify the audience	"You are writing to home owners and investors."
Provide context	"1 in 5 homeloans in Australia are due to roll off their fixed rate this year"
Specify the desired format	"Draft this as a 500 word article"
Ask specifics	"Include a call-to-action to request a call back with a mortgage specialist, don't include any of these Compliance-banned words"
Adjust tone	"Write in a professional, but approachable tone"

Prompt to copy & paste

Write a [OUTPUT] for [PURPOSE].

You are writing from [ROLE], and the audience [AUDIENCE].

The goal is to [CONTEXT].

It is to be [FORMAT] and [LENGTH].

The call to action is [CTA].

And the tone is to be [TONE].

Chapter Three

Building a ChatGPT that understands your business

Now that you've learned the basics of getting started with ChatGPT, it's time to explore how to truly personalise its capabilities for your mortgage broking business. By providing comprehensive background information about your business, values, and customer personas, you can unlock ChatGPT's potential to generate highly relevant and tailored marketing materials. This chapter will guide you through using detailed prompts to help ChatGPT understand the unique aspects of your business and deliver actionable strategies, whether you're creating social media posts, emails, blogs, or marketing campaigns.

3.1 Creating social media posts

Social media is a great way to connect with potential clients and keep your current ones informed. But coming up with new content regularly can be a challenge. That's where ChatGPT comes in!

Building a six-month social media calendar

The following detailed prompt is designed to help you create a robust framework that ChatGPT can use to generate a six-month social media content calendar. By feeding in all the critical information about your business, including target audiences, tone of voice, and marketing goals, ChatGPT can produce a strategic plan that aligns with your business objectives.

When using this prompt, remember to fill in the blanks with your specific business details, such as your company name, values, and client personas. The more information you provide upfront, the better ChatGPT will perform. Once you've filled in the details, ChatGPT can seamlessly create content that is tailored to your audience, increasing your reach, driving traffic to your website, and generating leads.

> **Remember:**
>
> The details you provide in this first prompt only needs to be mentioned once, but will be remembered and applied to all future prompts you write in the future.

Let's dive into the prompt

Hi, I'm going to give you lots of supporting information that will help you complete the task I want you to do for me.

Please do not interrupt me or respond until I type the words 'NOW GO'

I'm a mortgage broker based in [SUBURB], [CITY], Australia. My business is called [X] and I do [X, Y and Z]. Here's the link to my website for more information [link].

> **Remember:**
> ChatGPT can search the internet through Microsoft's "Browse with Bing." This feature can only be used through a paid subscription in the GPT-4 model.

I would describe myself as [X, Y and Z]. My tone of voice is [X, Y and Z].

I am the director or this business but I work with X amazing other qualified [insert brokers, loan writers, support staff] who …. and [short info on business partner].

Our values are [X, Y and Z]. This is important because [what we want to be known for].

We specialise in [X, Y and Z]. And tend to have a clientele [high level demographic e.g. blue chip, working class. Tip: quote the Helix Persona profiles you work with]

We do some [current marketing tactic #1] because [X] and [current marketing tactics #2] because [Y].

We help [who] do [X] by doing [Y] and [Z] [=mission statement].

Our typical clients look like this.

[Client persona 1 = Forever home with more space] Go into as much detail as you can.

This is their professional / life circumstances. They want to buy in this postcode, a California bungalow, enough space for the 2 kids growing up, 4 bedrooms and a study because one of them is a solopreneur who works exclusively from home, with a pool, no to small renovations needed, at the 2.4mil mark. They have $X in savings, X in equity, their owner occupied home was recently valued at $1.6mil conservatively and they need to borrow $X to make it all

Let's dive into the prompt (cont.)

happen. The problems or challenges these people typically face are:

They want to do a bridging loan and not sell their current house before they buy the new one which is risky for the bank

The husband's business is growing year on year but the financials of the business add complexity to the situation as there is more risks of mortgage default due to the unpredictability of the business performance...

[Another challenge]

And what I find time and time again is that they do **X** and **Y** and that's where they trip up until they find me and I can help with **Z** and back to **A**.

[Client persona 2 repeat framework]

[Client persona 3 repeat framework]

[Client persona 4 repeat framework]

[Client persona 5 repeat framework]

Now, with all that you know, act as my social media strategist and create a social media content calendar for the next 6 months. I want to put out an average of 3 posts a week through this IG/Facebook/TikTok/Linkedin profile [link].

For each day I need to post, please provide the below information a table format with 6 columns:

The day number or date

Your reasoning as to why you suggests this is worthwhile content for audience in one sentence.

A compelling hook for each post. The hook should be a short, engaging statement designed to grab the audience's attention immediately. For Example, 'Feeling stuck in mortgage prison and don't know how to escape?' or 'When was the last time you got real support from your banker?'

A caption for each post. This should provide more detailed information on what my audience will learn in that post and why it's relevant.

Let's dive into the prompt (cont.)

The post format: long form video (2min or more), short form video (under 2min), reel, story, copy only, graphic or illustration, real life photo, carousel, etc.

An image prompt (if appropriate): for image generator like Canva Magic or ChatGPT's native image generator; Dall-E.

My ultimate long-term goal is to generate leads for my business, but to start with and for the next 6-month period, my short-term goals are:

[desired outcomes and measurable metrics]

#1 increase audience reach by focusing on producing shareable content.

Success metric: [X]

#2 grow channel audience size.

Success metric: audience size increases by [X]%.

#3 drive as much as traffic as I can to my website [link].

Success metric: tracked website traffic source from social media increases by [X]% to [X, Y] pages.

Note: thoughts will have to be put into why you send them to the website for -> optimising marketing funnel for lead conversion.

NOW GO.

Follow up prompts

Follow up prompts are prompts that you give after the first one. Not only are "follow up prompts" useful to explore and expand on ChatGPT's responses for more information or additional explanation but they are more useful than creating a new prompt because ChatGPT takes into consideration previous your discussion so uses it as context for its next answers.

Follow-up prompts can encourage deeper thinking about content, strategy, and execution within a social media calendar context. Here are some examples of follow-up prompts that you can try:

1. **Elaborate** – to expand on content ideas or post themes.

2. **Explain how it fits into the bigger picture** – to ensure the content aligns with broader marketing goals or campaign strategies.

3. **Give real life examples** – to illustrate how social media posts can connect with followers or showcase brand values.

4. **Summarise in concise bullet points** – to create a clear outline or plan for each post.

5. **What are the next steps** – to define the execution process for the social media calendar.

6. **Walk me through your thought process** – to ensure clarity in planning and content sequencing.

7. **What are the potential benefits and drawbacks** – to evaluate the effectiveness of each post idea or campaign.

Equipped with the comprehensive background information about your business, values, and customer personas, ChatGPT can support you across other activities. Let's explore a few more examples

3.2 Writing client emails

Whether you're following up on a lead, sending out newsletters, or providing important updates. ChatGPT can help you draft professional, effective emails quickly.

How to write an email with ChatGPT

1. **Think about your message:** What do you want to communicate in your email? Are you introducing your mortgage services, thanking a client, or providing information about a loan option for first home buyers or investors?

2. **Type your prompt**: Enter your request into ChatGPT. For example, you might type, "Write an email to a client explaining the benefits of our new low deposit home loan option. Give me three alternative subject lines."

3. **Edit and personalise:** Read through the email that ChatGPT generates. Add the client's name, adjust any details, and make sure it sounds like you. .

4. **Send the email:** Once you're satisfied, copy the subject line and email text into your email client, and send it off!

Example prompts for client emails

- "Draft a follow-up email to a client who expressed interest in buying an investment property."

- "Write a thank-you email to a client who just finalised their home loan approval."

- "Create a newsletter email about the latest trends in mortgage interest rates and refinancing options."

3.3 Writing blog posts

Blogging is a fantastic way to share your knowledge, attract potential clients, and boost your website's search engine ranking. ChatGPT can help you generate ideas, write content, and keep your blog active without taking up too much of your time.

How to write a blog post with ChatGPT

1. **Choose a topic:** What would your clients find helpful or interesting? You could write about market trends, offer home-buying tips, or explain different mortgage options.

2. **Type your prompt:** Ask ChatGPT to assist with your blog. For example, "Write a blog post about the top 5 reasons why first home buyers should consider a mortgage broker."

3. **Review and refine:** ChatGPT will provide you with a draft. Go through it, add your insights, and adjust it to match your voice and style.

4. **Publish your post:** Once your post is ready, upload it to your blog, add images if needed, and publish it.

Example prompts for blog posts

- "Write a blog post about how investors can navigate rising interest rates."

- "Create a blog post explaining the difference between fixed and variable rate home loans."

- "Draft an article on the benefits of using a mortgage broker for refinancing."

3.4 Creating referral letters

Referral letters can be an excellent way to grow your business through word-of-mouth. ChatGPT can help you craft a letter that encourages your clients to refer others to your services.

How to write a referral letter with ChatGPT

1. **Decide on the message:** What do you want to say in your referral letter? You might want to thank the client for their business and ask them to refer friends or colleagues who might benefit from your services.

2. **Type your prompt:** Enter something like, "Write a referral letter to a satisfied client, asking them to refer others to our home finance services."

3. **Personalise the letter:** ChatGPT will generate a draft. Add the client's name, tweak the message to fit your style, and ensure it aligns with your brand.

4. **Send it out:** Once you're happy with the letter, send it to your client via email or print it out to mail.

Example prompts for referral letters

- "Draft a letter asking clients to refer our services to family and friends."

- "Write a thank-you note to a client who has already referred new clients to us."

- "Create a referral request letter to include in our monthly newsletter."

Conclusion

Thank you for taking the time to explore this guide on how ChatGPT can enhance your marketing strategies and streamline your operations as a mortgage broker.

At Connective, we're committed to equipping brokers like you with the resources and tools needed to not only thrive in today's competitive market but to continue growing as the industry evolves.

Whether it's using AI to improve your client communications, boost your social media presence, or streamline your email marketing, we're here to support your journey. Our goal is to empower you with the technology, guidance, and community needed to build a bigger, better, and more sustainable business.

As you move forward, remember that Connective will always be here to provide ongoing resources and expert support to help you reach new heights. Let's continue building success together!

Disclaimer

This resource is intended to provide general information on how to use ChatGPT and similar large language models (LLMs) to assist with content creation for marketing and communication purposes in the mortgage broking industry. While ChatGPT can be a powerful tool for generating ideas and content, it is important to understand that all content generated or assisted by ChatGPT, or any LLM, must be thoroughly reviewed and approved by the user before publication or distribution.

As a mortgage broker, you are responsible for ensuring that any content produced complies with all relevant industry regulations, including but not limited to the Australian Securities and Investments Commission (ASIC) Regulatory Guidance and the National Consumer Credit Protection (NCCP) Act. This includes verifying the accuracy of the information, ensuring that all representations made are clear, not misleading, and meet the standards of responsible lending and advertising.

Connective strongly advises that all content, especially materials related to financial products, client advice, or regulatory matters, be reviewed by a compliance officer or legal professional before dissemination to ensure adherence to current laws, regulations, and industry best practices.

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