

A person is sitting on a white sofa in a bright, airy room. They are using a laptop and a tablet. The laptop is open on their lap, and their hands are on the keyboard. The tablet is held in their other hand. The room has a white sofa, a white table, and a white chair. The floor is light-colored. The overall atmosphere is clean and modern.

EXCEL

# Quickstart Marketing Guide

# Welcome to Excel Marketing Vault!



We believe in the power of marketing and think it is essential to one's brand and business. Digital marketing is especially important in our everyday. Whether you are actively marketing or just getting started with digital - it's never too late. We want to make it as easy as possible for you to get started, catch up, stay up-to-date, and eventually maintain consistently. The need to do this is NOW.

Today, Excel Marketing Vault exists to help our Excel agents and loan officers grow online through the power of social media so they can unlock more time to focus on their true passion: helping people find homes.

# Accessing our Agent Portal

## STEP ONE

Login to the Agent Portal

**[Login here](#)**

## STEP TWO

Create your Canva account. You only need the free version to use our templates, but Canva Pro has a ton of great features, so we highly recommend.

**[Sign up for Canva](#)**

EXCEL  
REALTY & MORTGAGE

## STEP THREE

For updates and inspiration, follow us on social.

**[Excel Facebook](#) | [Louisa Facebook](#)**

**[Excel Instagram](#) | [Louisa Instagram](#)**

## STEP FOUR

Start exploring the Excel Marketing Vault!

**[Marketing Vault](#)**

# Tour of Excel Marketing Vault

SEARCH ALL MARKETING CONTENT



**GET STARTED** now! See announcements and any new content for the month. See also everything you need to get started with marketing at Excel, including all professional branding.

**MARKETING MATERIALS** to use for clients, and prospects now! Customizable templates of flyers, social posts, brochures, and more for updates and to promote

**LEARNING CENTER** of informative marketing material to educate clients and prospects throughout the process. Customizable templates of guides, presentations,

**RESOURCE CENTER** to help with bringing all of your marketing content to life and in front of clients and prospects. Lists of recommended vendors and services to

- **Where to Start:** Everything you need to get started marketing at Excel including all logos. Also found here:
  - **Quick Start:** Shortcuts, and checklist to complete before you begin marketing effectively.
  - **All Branding:** Excel logos, branding kit and a quarterly guide for photos.
  - **Tool Kits:** Sets of essential templates that you can keep handy for your marketing needs.
- **Market to Clients:** See all marketing materials that you need to market to prospects and clients here. You can use the 'search bar' or all content is categorized by the different ways to market as follows:
  - **Social Media:** For all of your posting needs for any social media platform.
    - **Listing & Promotional:** For all listings and to promote its status, yourself or an event.
- **Market to Clients >> Social Media (cont.):**
  - **Caption Templates:** Don't know what to say with your post? Need some inspiration? See this list of templates of what to say for different scenarios and occasions.
  - **Mortgage Process:** For all things relating to getting approved for a home loan such as interest rates, approval process, closing costs, local lender, etc.
  - **For Text & Email:** See all marketing materials to send via text or email - newsletters, prospecting, review requests, etc.
  - **Flyers & Brochures:** Listing flyers and brochures, and flyers for market updates, lending, open houses, etc. All for print or to send via email.
  - **Direct Mail:** Postcards, letters, and door hangers for listings, open houses, market updates, promoting yourself, etc. All to primarily send via mail or go door-to-door.

- **Market to Clients (cont.):**
  - **All Things Video:** Reel, Stories, YouTube templates and more. To share via email or post on various social media platforms, or embed on a web page.
- **Educate Clients:** This is a learning center of informative marketing content to educate your clients.
  - **Checklists:** Seller staging, home buying, seasonal home maintenance, etc.
  - **Guides:** Multi-page guides for buyers, sellers, renters, new construction, rent vs. own, etc.
  - **Presentations:** Multi-slides to share and present for your next listing, buyer, market updates, listing feedback, etc.
- **Helpful Info:** A resource center to help bring all of your marketing content to life, and help you look like a standout professional.
  - **How-To-Tutorials:** Training and tutorial videos, helpful articles, etc. to refer to and bookmark to go back to easily.
  - **Servicers:** A list of recommended servicers and vendors to help with your marketing needs.
  - **Systems & Tools:** Recommended systems and tools - software, apps, and more to boost your marketing, and simplify your marketing efforts.



# Customize Your First Template for Social

## STEP ONE

Make sure you have created and are logged in to your Canva account. Then, head over to the Marketing Vault - [TeamERM.com/Agent-Portal](https://TeamERM.com/Agent-Portal). Click the Marketing Vault icon. Click the Market to Clients icon, then the Social Media icon. Scroll down the page where you can view all the available content and select any template to customize.

## STEP TWO

Click the open button to open the template in Canva. Click the purple "Use template" button. Once you click this, the design is automatically saved and stored into your Canva account.

## STEP THREE

- Click the grid view on the bottom right to view all of the template options. Select and delete any you do not want to use (Hold down command while selecting to select multiple).
- Double click on the first slide again. Go to Uploads and upload a few photos of you. Drag and drop one photo of you into the circle frame.
- Go to File on the top right and select "Find and replace." type in "yourinstagramhandle" and replace it with your own Instagram handle.
- With Canva, you can change any of the colors and fonts to your own.
  - Change all colors or fonts at once by either:
    - A) Selecting an element and changing the color/font. A box will pop up on the bottom left asking you'd like Change all. Select this if you would.



- B) On the left vertical toolbar, go to "More" > "Styles" and select from the options. If you have Canva Pro, you can add in your own options.
- Once everything looks good, click Download on the top right. Make sure "PNG" is selected as the file type and download all images.

# Scheduling or Posting on Facebook Meta Business Suite

## STEP FOUR

There are a few different ways to post to Instagram. We recommend posting directly through Instagram or Facebook for the best results. On the following step, we will walk you through posting or scheduling in Facebook Meta Business Suite.

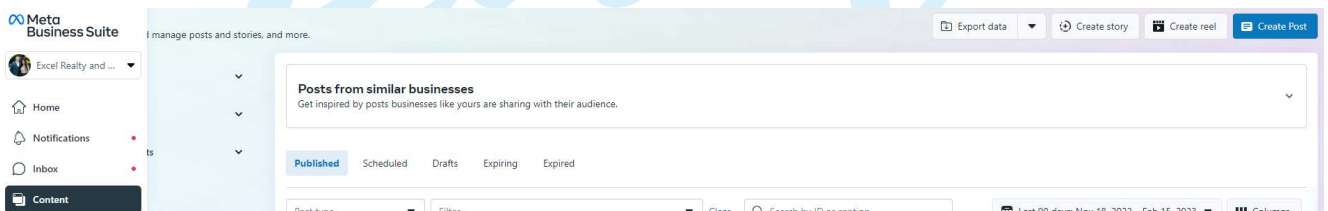
Alternatively, you could AirDrop or NearbyShare the content to your phone and post directly to Instagram on your device. You may also post directly on the Instagram website.

## STEP FIVE

Now head over to Facebook Meta Business Suite. (Google "Facebook Meta Business Suite" and select the first option). To utilize this feature, you'll need your Instagram to be set as a business account and your Facebook linked to it. [Click here for instructions on this.](#)

## STEP SIX

Flip over to the Instagram icon in the top center. Then select the green Create post button on the top left.



1. Select Instagram Feed
2. Copy a caption from Excel Marketing Vault and paste it into the caption box.
3. Add a location in the location box
4. Select Add content > From file upload
5. Select the images you'd like to post. If it is sized 1080x1350 select the crop button on the bottom of the images. Select Vertical to correct the dimensions to fit the new sizing.  
Select the checkmark next to Post to Facebook then select the drop down to the right of this and change it
6. from Publish to Schedule with the date and time you'd like to schedule it for. Then, over to the right do the same thing with the blue Publish button. **This step is very important as you may end up scheduling to one platform while posting immediately to the other.** Make sure both of these are scheduled for the right time. Hit schedule once everything is good to go!

# Next Steps

Ready to level up your Instagram? Then take these next steps:

- Download the Quarterly, Monthly, and Weekly Checklists to stay up to date on your marketing.

[Linked here](#)

- Download the Content Creation Workbook to help develop your content pillars and organize your whole month.

[Linked here](#)

- Give yourself an Instagram Audit to make sure your account is set up for success.

[Linked here](#)

- Use the Excel Branding Workbook to gain the tools and insight you need to build your brand on social media.

[Linked here](#)

- Use the Quarterly Excel Photo Branding Guide filled with great information and photo ideas.

[Linked here](#)

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We are always here to help! If you ever have any questions about our Agent Portal, the content, or social media in general - shoot us a message at [Louisa@ERMRealty.com](mailto:Louisa@ERMRealty.com).

Check out [Resources & More](#) for tutorials, training videos, guides, tips and more. Feel free to send your questions through our [Google Group](#) for added support.

The Excel Team

[TEAMERM.COM](http://TEAMERM.COM)



# Frequently Asked Questions: Instagram

While we're here, let's go ahead and tackle some FAQs.

## Should I have one account for both my personal life and real estate, or should I create a separate "real estate" account?

For best results, we recommend having one account for both. If you already have an Instagram, we recommend starting to add in real estate content to what you currently post. This way, you'll already have a following base and you're not starting from scratch. However, if you think you won't be comfortable posting real estate content on your personal account, having two accounts is fine. This is such a hot topic that we created a pinned topic for posts about this in the Facebook Group. Check it out to read what the community has experienced with this.

### TWO ACCOUNTS VS ONE

## Should my account be Personal, Business, or Meta?

Here are the major differences between having your Instagram set up as a Business, Meta, or Personal account.

Personal Instagram:

- You can have your page set to private
- You cannot schedule your posts
- You do not get insights on reach and engagements
- You cannot promote your posts

Business & Meta Instagram:

- You can not set your page to private
- You can schedule your posts
- You can see insights on reach and engagements
- You can promote your posts
- Access to Inbox tools like saved replies and sorting

Differences between Business & Meta:

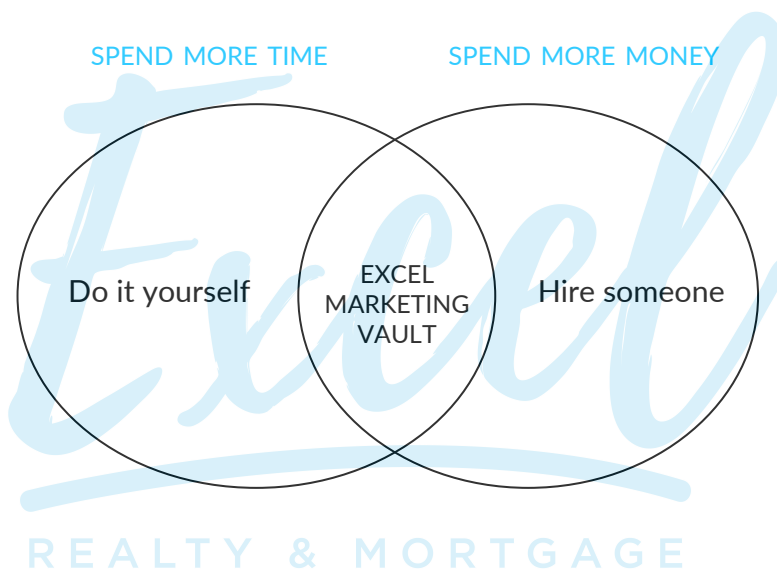
- Currently you can not schedule through third parties on Meta Business Suite Accounts.
- Different profile category options (like Real Estate Agent, Clothing Brand, Ice Cream Shop, etc.)
- On a business account you can add your business address to your profile

We recommend a Business Account for real estate agents as you are technically a business.

## This would be a lot of easier if it just automatically posted for me. Do you have an automated scheduler?

The truth is, you will not see real results with an automated posting service. We want you to add your personality and brand to your posts so that you will see good engagement on your posts and ultimately start attracting new followers (who will turn into clients!). Unfortunately setting up automated posts for everyone wouldn't be beneficial for your accounts - you won't see any real engagement or results from these types of services.

Consider us to be your new marketing mentor-- we don't post for you but we empower you with the tools you need to own your social media accounts. We're here to help you add your own personality to posts, brand your business, and connect with people online. We want you to take ownership of your online presence so we put the power tools in your hands.



## How often should I post? When should I post?

There is no secret times that your post will do better. There is not a magic number of posts per week. Stop worrying about the "algorithm" and focus on this one thing:

**Create scroll-stopping content.** The only thing you need to know about the algorithm is that Instagram wants to keep users on the app as long as possible. Focus on creating content that makes the user stop, swipe through your post/watch the reel/read the caption, and bookmark for later because there is some good nuggets in the post they don't want to forget! *(Don't worry, the posts in our content calendars are created with this as the priority!)*

*Side note: Just try to post when you think your audience is the most active. We like to post around mid morning or mid afternoon.*