

Mortgage Social Media Benchmark Worksheet

A practical scoring worksheet for loan officers. Use it to evaluate content consistency, content mix, lead-magnet habits, and review discipline. Benchmarks are directional, not performance guarantees.

Cadence score

- 0: no reliable cadence
- 1: one to two posts per week
- 2: three posts per week
- 3: four to five useful posts per week

Content mix score

- 0: mostly offers or rate talk
- 1: some education mixed in
- 2: balanced education and trust content
- 3: roughly 80% useful education, context, or reputation content

Review score

- 0: posts go out without review
- 1: sensitive posts are checked
- 2: every asset gets a claim/disclosure pass
- 3: every export gets a repeatable federal baseline review aid plus company review where needed

Weekly posts

Target: 3-5 useful posts

Lead magnets

Target: 1 focused guide or checklist per week

Monthly review

Target: identify 2 reusable winners
