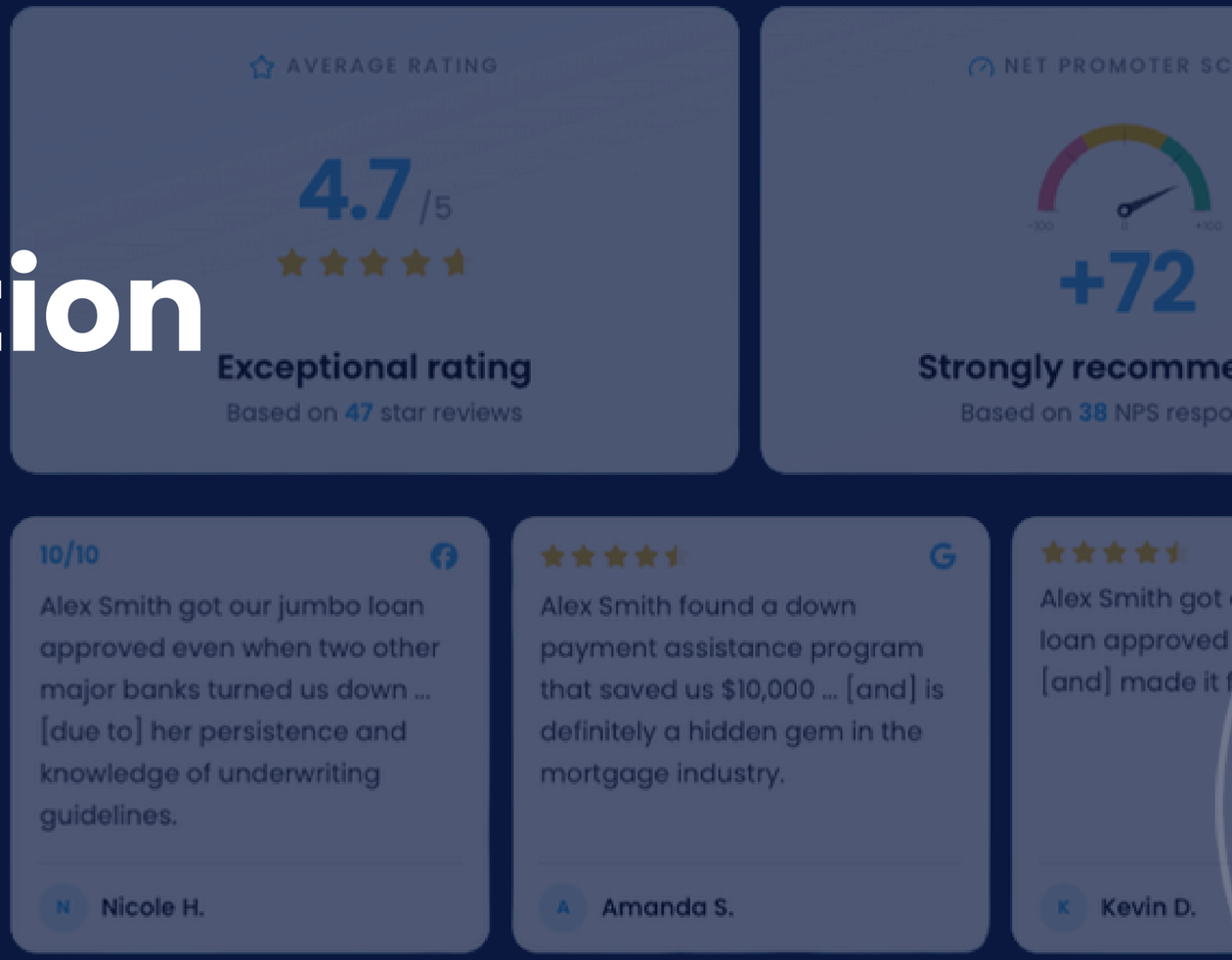
SocialCoach

Win With Reputation in Search and AI

A review is a referral: a past borrower vouching for you to someone you've never met.



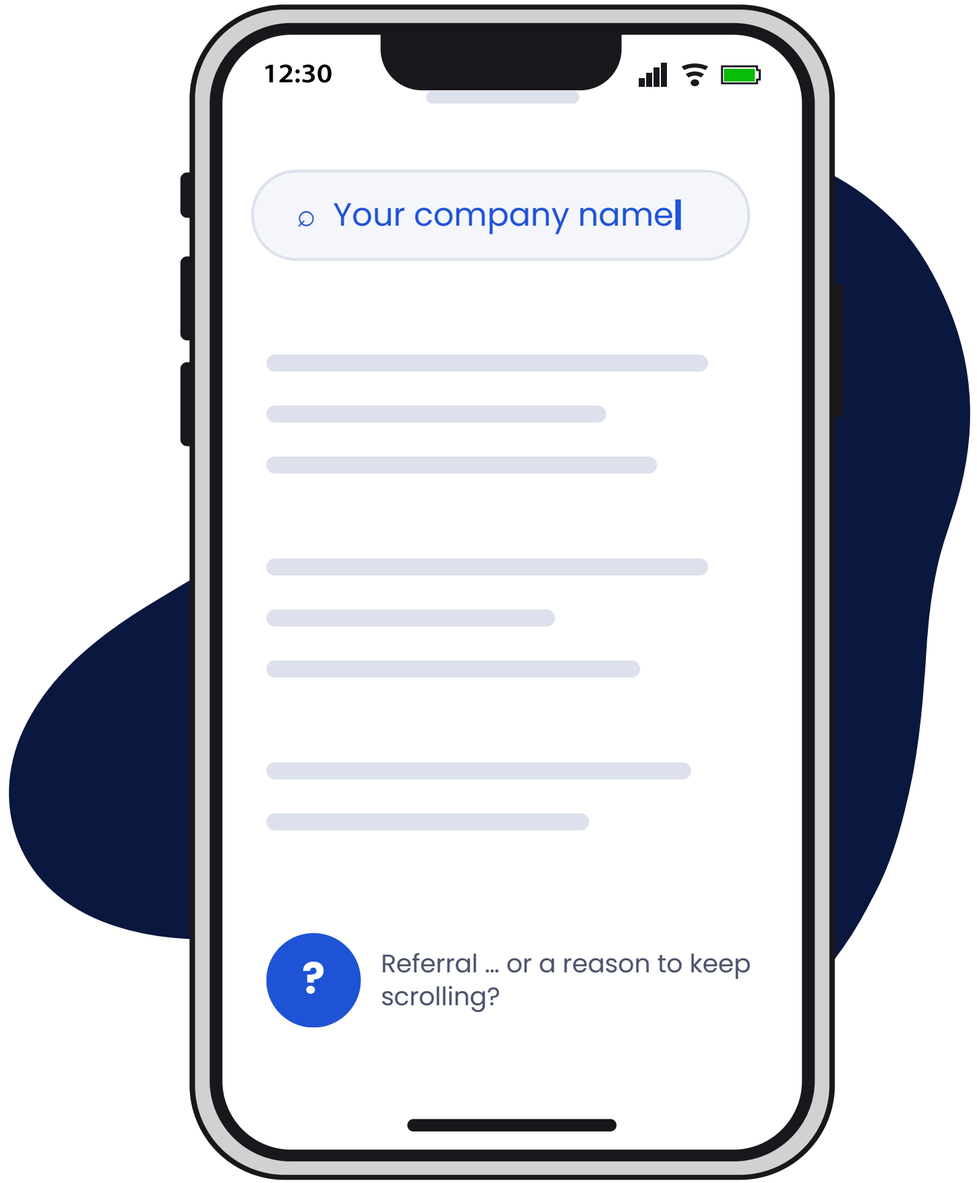
Joe Wilson · Founder and CEO, SocialCoach

Would the internet convince a stranger to trust you?

A borrower has never heard of you...

They Google you.
They ask ChatGPT.

They find either a referral or a reason to keep scrolling.



SocialCoach

When did your last borrower choose you?

- **A** Before they called you
- **B** During the first call
- **C** After comparing rate quotes
- **D** No idea

THE DECISION HAPPENS BEFORE THE CALL

56%

of buyers contacted only one lender. **Just one.**

SocialCoach

THE COST OF NOT CHECKING

The loans you lose here never show up in your pipeline.

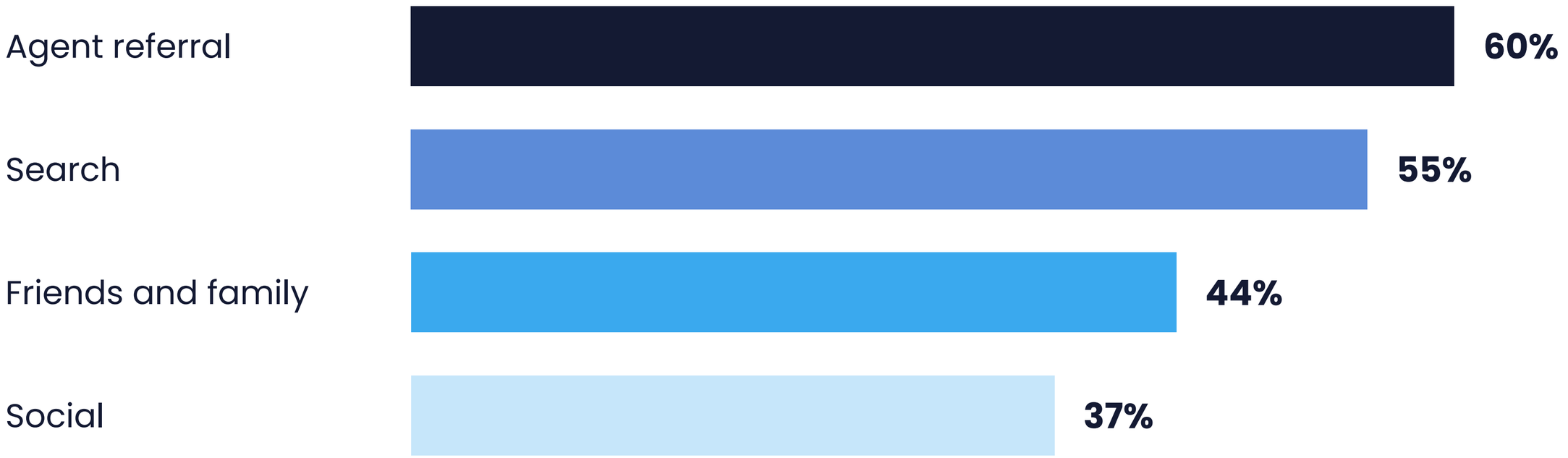
No call. No lead. No lost-deal reason in the CRM.

The borrower checked you, chose someone else, and you never knew you were in the running.

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THE DECISION HAPPENS BEFORE THE CALL

Who refers best?



Multiple answers allowed. Source: Zillow Consumer Housing Trends Report 2024

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THE REFERRAL GOT A BACKGROUND CHECK

A review is a referral.

The referral didn’t disappear. It moved online, and now your past borrowers are the ones giving it.

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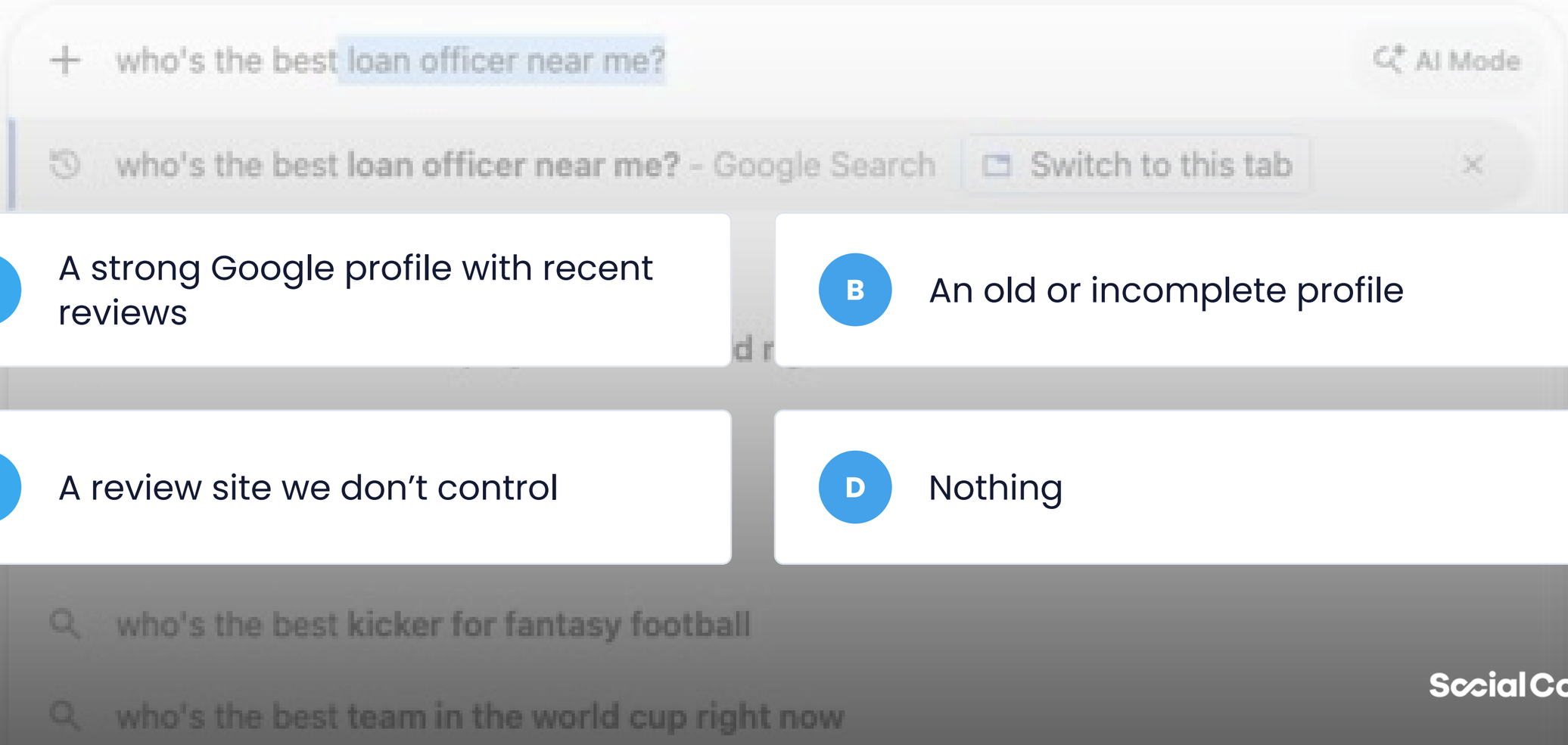
THE REFERRAL BACKGROUND CHECK

The agent says, “Call Sarah.” The borrower investigates Sarah first.



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Google who the best mortgage professional in your area is. What shows up?



A. A strong Google profile with recent reviews

B. An old or incomplete profile

C. A review site we don't control

D. Nothing

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AI IS CHANGING THE SEARCH GAME

6% → 45%

of consumers used AI tools for local business recommendations in 2026

General consumers, not mortgage specific. Source: BrightLocal, 2026

SocialCoach

Where AI gets its answers

AI names you based on what other sites say about you.

ChatGPT

Searches Bing, then cites 3 to 5 sources that show ratings

Google AI Overviews

On mortgage questions: 60% editorial sites, 0% lender sites

Local searches

About 37% of citations are directories and review sites

Every engine

Answers change run to run. Test 3 times before you judge.

Sources: Search Engine Land, May 2025; Audits.com US Mortgages AI Index, June 2026; UX Continuum AI answer sources study, Sept 2026

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What does AI say about lenders in [city]?

AI “Who are the best mortgage lenders in [city]?”

Who’s named

Are you there at all?

What it cites

Which reviews and sites it trusts

What’s wrong

Old info, wrong people

Who’s missing

Strong LOs with no footprint

SocialCoach

Fix what AI reads about you

AI pulls from your profiles and your reviews. Make both complete, consistent and specific.

1. **Profiles**
   Google, Bing Places, Zillow, Facebook, Yelp, BBB
2. **Consistency**
   Same name, NMLS, address and phone everywhere
3. **Better asks**
   “What would you tell a friend buying in [city]?”
4. **Replies**
   Answer every review with specifics, never loan details
5. **LO pages**
   Real text: NMLS, cities, loan types, FAQs, reviews, schema
6. **Mentions**
   Realtor and builder sites, local news, “best lender” lists
7. **Answers**
   Video answers to top borrower questions, with transcripts
8. **Measure**
   Same prompts monthly, 3 runs each. Log who’s named.

REVIEWS HAVE TWO JOBS

Help borrowers find you.
Help borrowers choose you.

1

Find you

Google says reviews and ratings can help local ranking, alongside relevance and distance.

2

Choose you

Detailed borrower stories turn a search result into a phone call.

Source: Google Business Profile Help, “How to improve your local ranking on Google”

SocialCoach

500 reviews that say “Great,” or 100 that *tell the story?*

Great experience	★★★★★
Great	★★★★★
Highly recommend	★★★★★
Great service	★★★★★

★★★★★

“Sarah got us closed in 21 days after our appraisal came in low.”

ILLUSTRATIVE EXAMPLE

SocialCoach

REVIEWS HAVE TWO JOBS

What borrowers want is what detailed reviews prove

56%
Lowest rate

41%
Prompt communication

39%
Close on time

Rate lives on a rate sheet.
Communication and closing on time only show up in reviews.

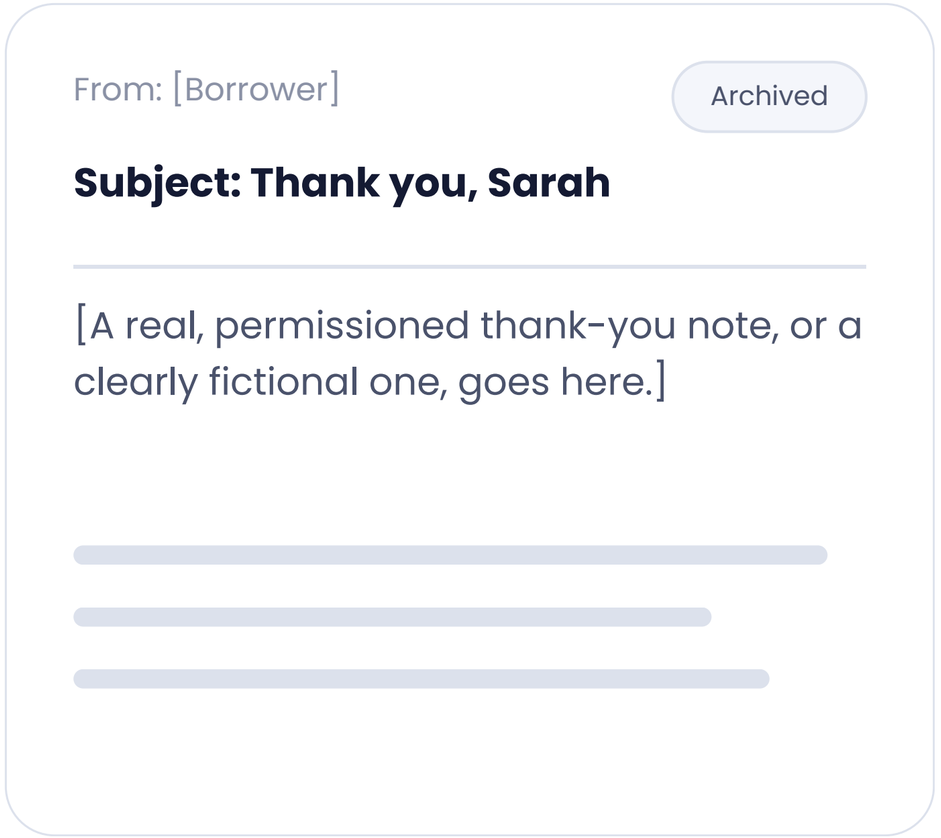
Source: Zillow Consumer Housing Trends Report 2024

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IT'S A CAPTURE PROBLEM

The thank-you email that dies in an inbox

A borrower writes a heartfelt note after a hard closing. Where does it go? **Usually nowhere.**



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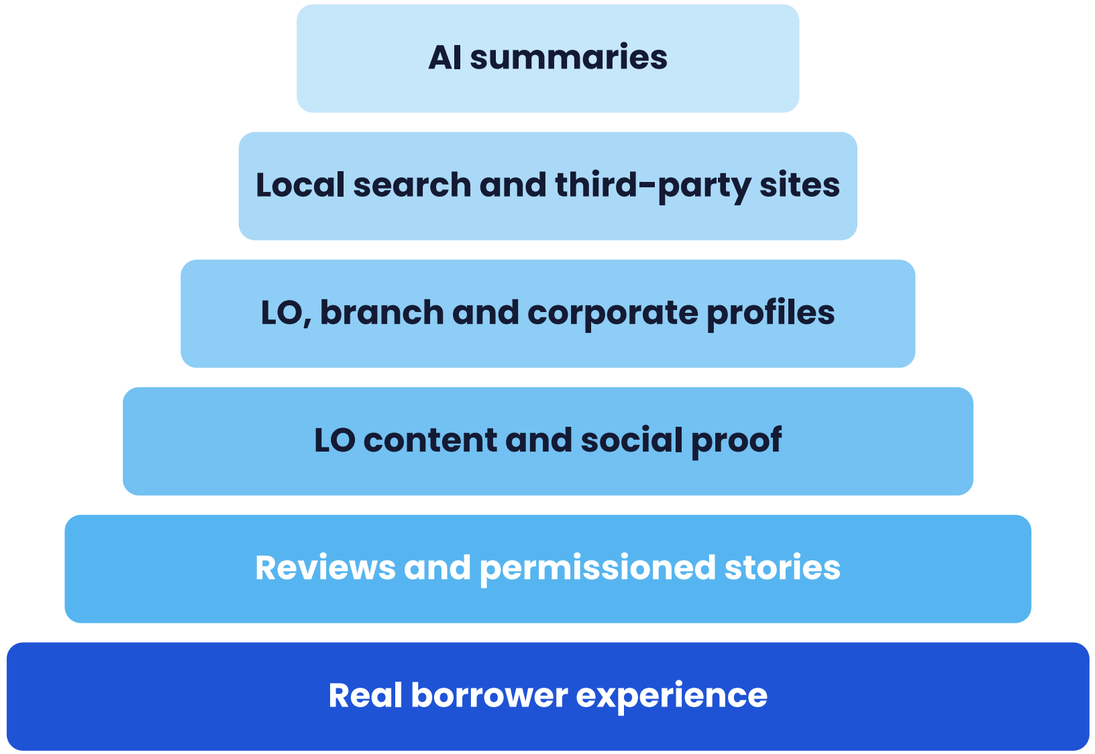
If you want to show up for VA loans, ask specifically for military members to leave you VA reviews

First time homebuyers your specialty? Make sure that your buyer mention how they were buying there first home and where!

The stronger the ask, the more deatiled the response, the better the search results

Sccial Coach

The Trust Stack



Capture at the bottom. Distribute up.

WHAT STRONG LOOKS LIKE

AI names your LOs and cites your reviews

Accurate listings and recent reviews everywhere

Every LO has a complete, current profile

Real reviews show up in LOs' social feeds

Specific, recent reviews for every LO

Praise captured at closing, every time

SocialCoach

SOCIALCOACH REPUTATION MANAGER

We kept seeing this gap with lenders, so we built for it.



Most review tools collect a review and stop there. Reputation Manager starts there.

SocialCoach

REPUTATION MANAGER · WHY

Why we’re changing the reviews game

Review platforms: collect and stop

- Collect a review, then stop
- Reviews sit on the review site
- One more vendor, login and contract
- Another system for compliance to watch

SocialCoach: collect and start

- ✓ Every review becomes branded social content
- ✓ Fresh reviews help in search and AI
- ✓ In one platform with social and video
- ✓ Real-time compliance checks on replies

Collecting reviews is table stakes. **Putting them to work is the new standard for mortgage brands.**

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Request → Review → Social Proof

https://myoc.io/f/XItp216W

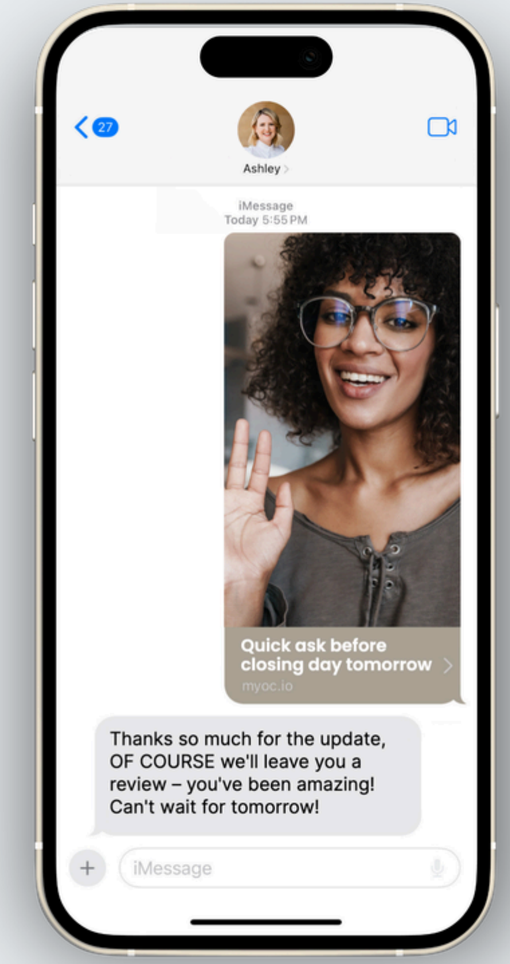
Boost Your Review Rates

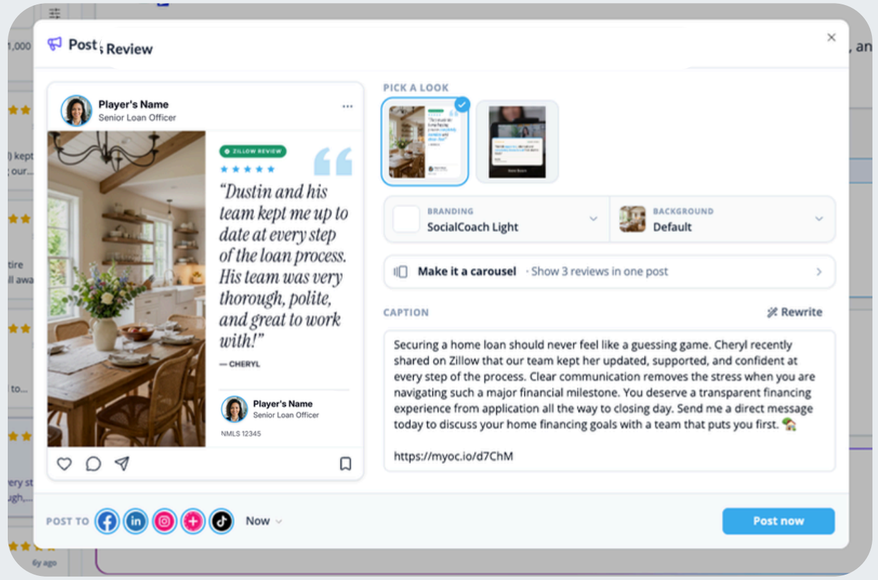
Record Personal Video

Highly Recommended

Record a quick, personal video thanking them and asking for their support.

Takes about 1–2 minutes. Just read the teleprompter!





SocialCoach

REPUTATION MANAGER · BE FOUND

Built to be found

Fresh reviews and fast, compliant replies can help every LO show up where borrowers look.

1

Google

A steady flow of fresh reviews and compliant replies

2

AI answers

Specific borrower stories AI can find and cite

3

Social

Reviews shared as branded posts on the LO's network

4

LO pages

Reviews and a "write a review" button on every LO page

The Trust Stack, running bottom up, for every LO.

The next borrower sees the proof before they call.

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Treat every review like a referral

Start

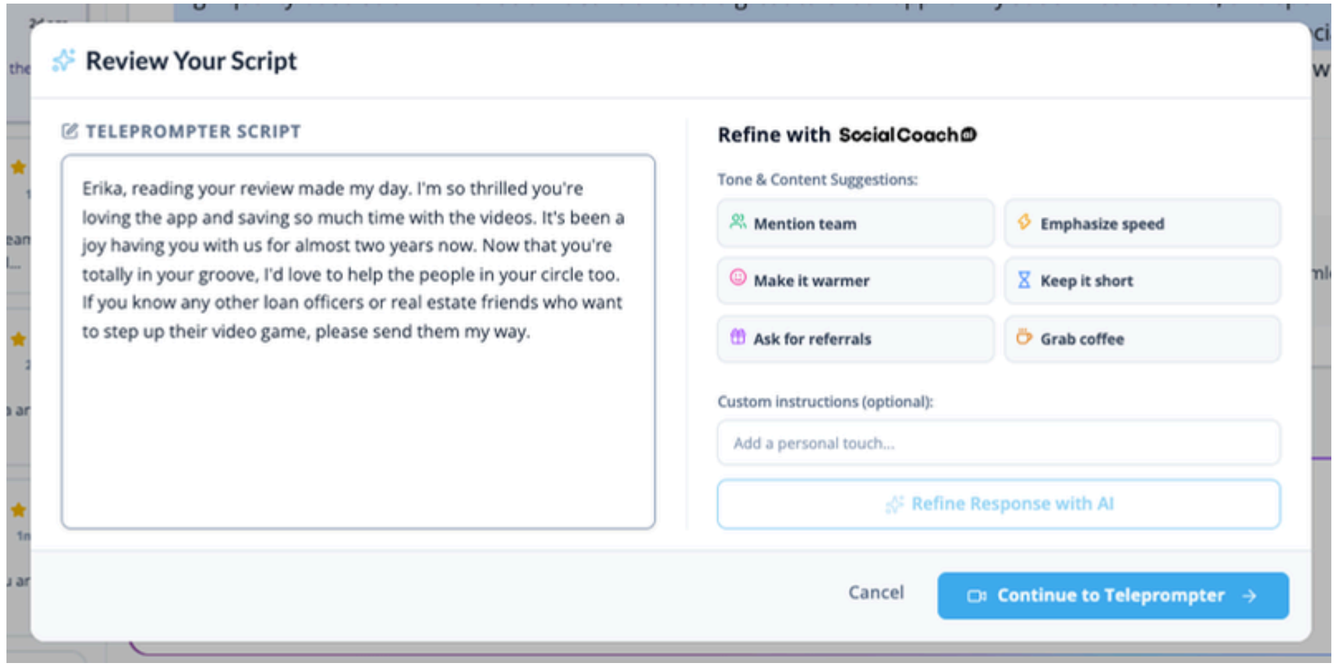
Ask in the LO's own voice, by text or personal video

Turn every review into a post on the LO's own social

Feature borrower stories, not star counts, on LO pages

https://myoc.io/f/XItp216W





SocialCoach

Repurpose Your Content

Stop

Letting your best referrals sit on someone else's platform

Treating a star average as your brand

Sending one survey blast and calling it a review program



SocialCoach

Your next 30 days

1. Week 1: Run the AI prompts and audit every profile
2. Week 2: Fix listings everywhere and claim Bing Places
3. Week 3: New review ask, and reply to every review
4. Week 4: Refresh LO pages: FAQs, reviews, schema
5. Day 30: Re-run the same prompts and compare



SocialCoach

CHANGE THE ANSWER FOR 2027

If a borrower knew nothing about you, would the internet convince them to trust you?

Every review is a referral.
Make sure the next borrower hears it.



SocialCoach