

KALEIDICO



# 90-Day Mortgage Marketing Plan

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What do you want most for your mortgage business? Maybe you just landed the marketing director role with a progressive mortgage lender, or you want to pivot from a traditional branch operation. Or maybe you're just trying to reach more customers.

It might feel like there are endless objectives to choose from and infinite strategies to reach them.

Kaleidico's 90-Day Mortgage Marketing Plan was created to help you strike the ideal balance between strategic planning and rapid execution. Optimize digital marketing and reach targeted goals, while continuing to focus your resources on serving your customers.

Our full digital marketing plan, with a strategy spanning several channels, will shape your entire online presence, build your audience, and most importantly generate qualified leads and immediate wins. What would you accomplish if you could reach more people?

### What you'll learn

**Why digital marketing is important for your business**

**Your digital marketing plan at 30, 60, and 90 days**

**Managing your next set of goals**





## Why digital marketing is important for lenders

Through a digital marketing strategy, your website can be your most powerful and economically efficient source of mortgage leads. People are looking for lenders online. Let's help them find you.

Online lead generation is essential to modern mortgage lenders and contributes to rapid growth. Our proven process transforms traditional branches to consumer-direct lead generation powerhouses.

Breaking down your marketing efforts into our three-month plan gets results in one quarter, whether you take it on within your business or enlist the help of an experienced mortgage marketing agency like Kaleidico.

### How you'll benefit from strategic digital marketing

If you provide a product to people but don't have an online presence, you're missing out on accessing a larger market. Whether you're looking for more leads, already receive several but wish they were more qualified, or have various other sales needs, shaping your online presence creates a targeted approach to reaching your ideal customers.

Just like building relationships can fuel referrals, building your digital marketing strategy can produce qualified internet leads.



## The way consumers find lenders is changing

**92%** of new mortgage borrowers research online before speaking to a lender

**66%** of homebuyers would prefer to handle their mortgages entirely online

Source: Fortunly's [20+ Mortgage Statistics to Be Aware Of](#)

## What we've seen working with other lenders

We've generated mortgage leads since 2005, through booms and busts, advising large national consumer-direct lenders, mid-market branch lenders, and small savvy fintech startups.

Most lenders are sitting in one of these four categories of opportunity:

- 1 No Internet mortgage lead generation
- 2 Buying all leads from lead aggregators or rate tables
- 3 Generating all leads from direct mail or other offline marketing
- 4 All leads are generated by individual branches and loan officers

All of these situations can be fertile ground to create incredible new consumer-direct, online mortgage lead generation.



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### How digital marketing and online lead generation work

Through digital marketing and online lead generation, you'll use digital tools to reach your audience and offer your services. These tools offer precise targeting abilities, mixed with the art and science of both communicating to and reaching your audience where they already are.

Optimizing online searches helps potential customers discover the financing they need, which means you get more qualified leads. As more people discover you online, our full digital marketing strategy will also show what sets you apart and educate potential customers about what they'll experience when working with you. When they first engage through a rate quote or email signup, they'll get warmer.

Our 90-day marketing plan gives you concrete steps built on this strategy, with the combined goals of reaching the right potential customers and communicating to make them feel confident and comfortable enough to want to connect with you. Capturing these audiences generates referrals, makes sales easier, and stocks the pond for leaner times.



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## What Kaleidico Can Optimize for You

Working with an experienced mortgage marketing agency like Kaleidico can make this even simpler. In changing markets for over 15 years, we've built a proven framework for strategic marketing execution, including enhancing these online channels for lenders.

### YOUR WEBSITE

- Progressive lead paths
- Product landing pages
- Loan officer bio pages
- Branch pages
- Rates information
- Mortgage education
- Mortgage tools and calculators
- How the loan process works

### ADDITIONAL CHANNELS

- Ranking SEO blog content
- PPC ads
- Email marketing
- Social media and video

### LEAD NURTURING

- Remarketing
- Automated lead processing
- Lead conversion support

## 90-DAY MORTGAGE MARKETING PLAN



## 90-Day Marketing Plan Framework

Let's break this down. Each month, over the quarter, you can take clear steps toward achieving your marketing goals, increasing leads, and improving your business.

30 DAYS	60 DAYS	90 DAYS
<b>Get Started</b> Assess how things are going currently Identify new opportunities Begin building your plan and testing tactics	<b>Assess and Evolve</b> See leads and traffic increase Track KPIs Fully assess new marketing efforts Adjust tactics to stay on track toward goals	<b>Nurture and Convert Leads</b> Experience how new online leads are different Improve lead processing Nurture relationships you've started building

### What is your next set of goals?

Repeat the process to reach your next set of business objectives.

## The First 30 Days: Get Started

It can be difficult to assess your own performance, but everything you need to start the first 30 days is right in front of you. Get to know where you are and where you want to go.

Note and assess your current resources and marketing efforts, identify your first set of business objectives, and break down the tactics you'll begin testing.

### 3 Steps to Determine How Things are Going

#### 1. CONSIDER YOUR MARKETING INVENTORY

##### **What channels are you using?**

This includes your website, any social media like LinkedIn or Facebook, and other channels such as referral networks, personal finance sites, etc.

##### **What campaigns are you running?**

Are you currently running any digital ads through Google or social media? We primarily focus on digital campaigns but these could easily tie to others such as direct mailers, print ads, commercials, event sponsorships, etc.

##### **What content or content resources do you currently have?**

This includes written content, or even photography and video assets you already have. Do you have an existing website with any of these elements? Are you publishing this content on any other channels? Are there people within your business who already produce or are interested in producing content?





## 2. ASSESS YOUR LEADS

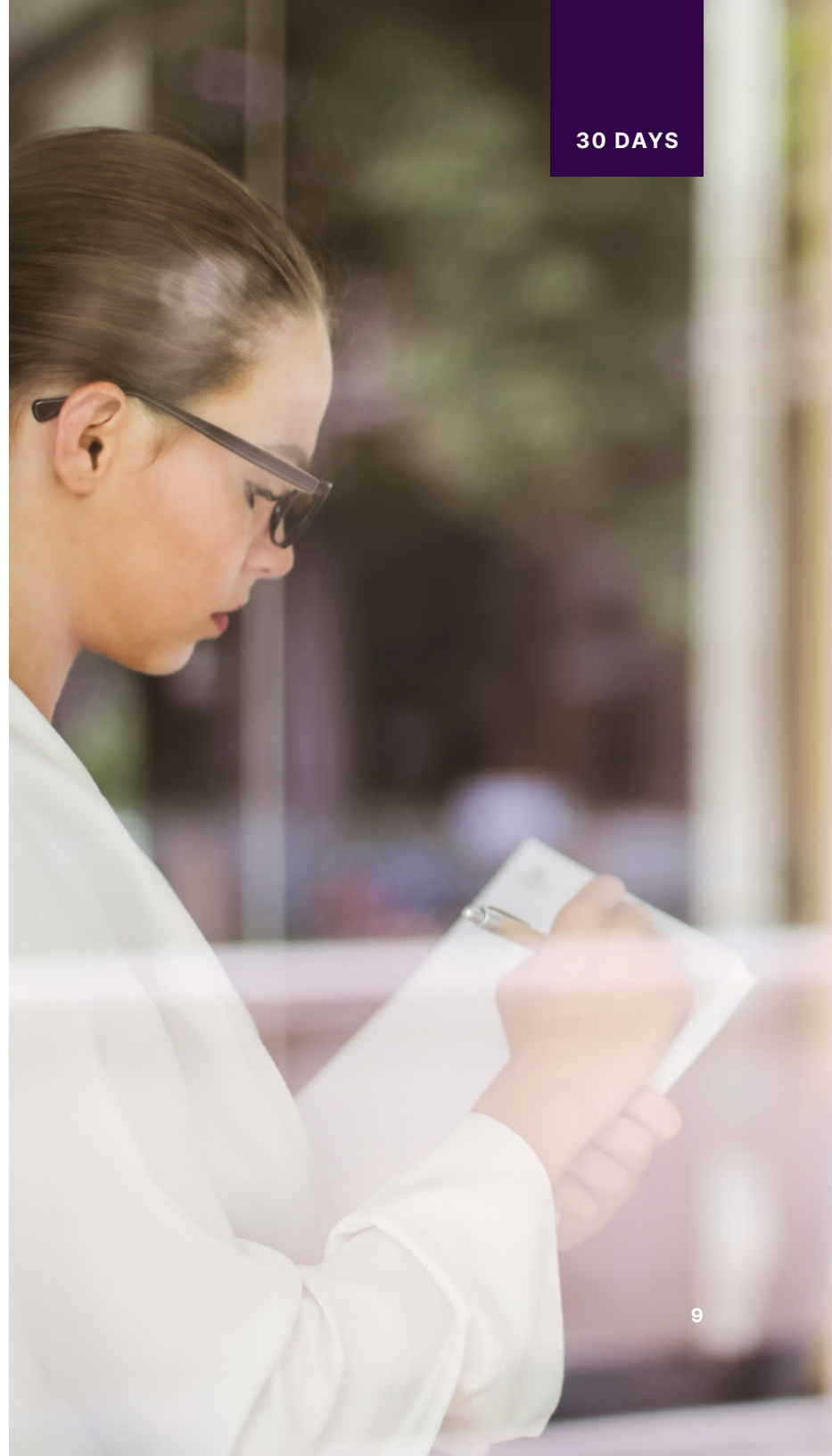
Ask yourself these questions:

- Are you getting leads, and if so, what are your sources (online marketing channels, lead aggregators, rate tables, offline marketing, networking)?
  - What is the quality of the leads?
  - How many of them convert to becoming customers?
  - How prepared or ready are they to become customers?
  - How do loan officers feel about the leads?
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## 3. UNDERSTAND YOUR LEADS' JOURNEY

Consider these questions as a starting point:

- For the leads you're currently generating, what is the journey they're taken on when interacting with you?
- What is their first impression of you?
- How often do you interact?
- Do they quickly and automatically connect with someone or is this process feeling complicated for both your team and your potential customers?



## Next, we'll begin to shape your digital marketing plan

### Look for opportunities

After assessing your current efforts and situation, it's time to look to the future. Your marketing plan will help you determine where and how you can get more qualified leads.

This involves a combination of considering what details and tactics can provide new opportunities, as well as what new big-picture objectives can improve your business.

With an inventory of your current marketing, you'll begin to see holes and places for improvements. By analyzing the quality of your leads and their journey to connect with you, you'll see areas to improve engagement with potential customers or operational obstacles that can help leads flow into your team.

Paying attention to these three often under-estimated, high-intent, easily scaled lead sources will be a good starting point:

- **Your website** – Most websites are poorly optimized for lead generation and almost always can yield more leads with design and development changes.
- **Lead buys** – Many mortgage lenders buy internet leads, but most organizations don't have the experience or expertise to optimize their mortgage lead buys for maximum performance.
- **Email lists** – Your database of past and current leads is always a gold mine for more high-quality leads. Too often, these email lists are left neglected.

### Start testing

Once you've filled out the worksheet for one or a handful of business objectives, you've outlined a clear path for your new marketing efforts to begin.

Implementing digital marketing tactics and watching them work takes time, as you can imagine. That's why this plan spans 90 days. By breaking down this timeline, you'll have clear checkpoints to understand whether the plan is working and to readjust it as needed.

The efforts you'll begin to implement and test now will be evaluated leading up to 60 days, and then 90 days.

→ **Our Digital Marketing Plan Worksheet on the next page will help you break down your objectives and the tactics to reach them.**





# Digital Marketing Plan Worksheet

Create a clear path for each business objective you want to achieve. Build a concrete digital marketing plan from start to finish and ensure you don't lose focus or waste time in your 90-day marketing plan.



[Download and fill out your own Digital Marketing Plan Worksheet](#)

<p><b>Business Objective</b> Determine a business objective and Key Performance Indicators (KPIs) that will help you measure how to meet it.</p>	
<p><b>Audience</b> What audience do you need to reach your objective? What channels do they use?</p>	<p><b>Traffic</b> What channels/content/campaigns will build traffic from this audience and do they need to be created or updated?</p>
<p><b>Conversion</b> How will traffic convert to leads? Note channels, CTAs, and lead paths you need. How will you manage the relationship and process with leads to help them convert to clients?</p>	
<p><b>Nurturing</b> Conversion takes time. What tools will you use to nurture the ongoing relationship with leads to keep them engaged until they're ready to work with you?</p>	

## 60 Days: Assess and Evolve

In the first month of your 3-month plan, you took the time to dive into your current situation. Those opportunities you began to identify need time to be implemented, tested, and evaluated to decide whether they'll pay off or whether they may need to be refocused. In the second month, you'll focus on assessing these new efforts.

### Understanding KPIs

In the first 30 days, you determined business objectives you want to reach and focus on during this 90-day marketing plan. These can feel abstract and out of reach if you don't outline specific and actionable details that will help you measure whether you're meeting the objectives.

This is where KPIs come in or Key Performance Indicators, which are quantifiable measurements that make it easier to assess long-term results. These might be customer-focused or process-focused, for example.

Many digital marketing tools provide automated reporting, which can help you track KPIs. Identifying which of these data sets you want to pay attention to and how to gauge their changes is the secret to making sense of measuring your goals.

**When it comes to generating leads, consider measuring KPIs such as:**

- Traffic
- Leads generated
- Cost per lead
- Time on page
- Conversion rates
- Return on Ad Spend
- Email open rates
- Bounce rates

## 60-day assessment

As you approach the 60-day mark, you'll want to assess whether your initial tactics are paying off. Digital marketing gains momentum over time so expect that you will likely not have reached your ultimate objectives in this time frame. Instead, assess whether they are trending in the right direction.

### **At this point, the following are indicators of success:**

- A young, but effective lead traffic platform has been created
- Good, high intent organic and PPC traffic should be on its way
- We should be seeing our first leads

As we've mentioned before, marketing and online lead generation is both a science and an art. Measuring KPIs needs to be balanced with other more human aspects of your efforts as well. How are your loan officers feeling about the new leads that have come in? Do your values and loan products properly align with how you're presenting your business across multiple channels online?

Targeting and converting the ideal audience also involves trial and error. Balance giving your new tactics time to work, with making slight adjustments as you begin to see results to stay on track toward your goals.

After you test some tactics and see success, you can then consider adding more traffic channels to your lead generation system.





## Build up your marketing strategy

One important aspect of making the most of your 90-day marketing plan is having a sustainable way to produce and share the content that fuels each channel where you're building an audience. This is where content marketing comes in and sets a foundation for strategic and efficient marketing efforts.

Begin by developing an editorial plan to decide what content needs to be created, as well as how it will be used. The bulk of these content efforts will go toward feeding your blog. However, smaller content needs will pop up for each marketing strategy, from digital ads, to email marketing. Across all of these channels, establish topics and maintain a consistent voice and tone for your business.

For example, blog posts should relate to educating potential clients. This could include topics about the mortgage process, loan types, personal finance, rates, and what it's like to work with a lender.

Quality content, the kind that ranks well in search engine results, is not cheap and needs to be strategic. So we want producing this content to be as efficient as possible when it comes to determining the right content and how it's produced and published to give it the best chance to rank.

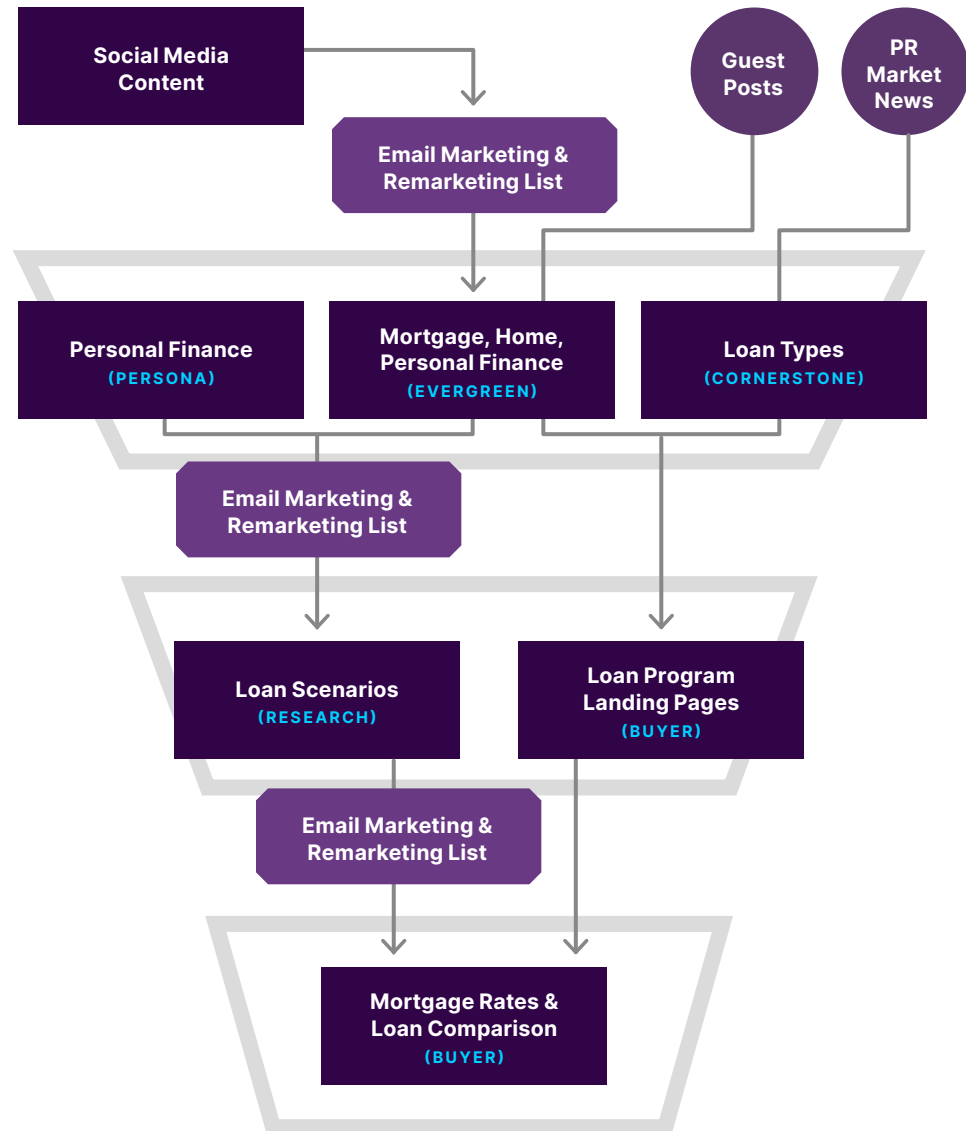
### Successful content marketing incorporates and cycles through this process:

1. Establish seed words and concepts
2. Do ongoing keyword research
3. Build out information architecture
4. Create and manage editorial calendar
5. Write and edit SEO content
6. Design, develop, and publish content
7. Distribute and promote content

## Content Marketing Framework FOR LEAD GENERATION

Kaleidico has shaped this proven content marketing framework, which shows how all the elements of a solid digital marketing plan can come together.

This framework guides your leads from their research and the channels they visit, through your sales and marketing process, to making case inquiries, and becoming clients.



## 90 days: Nurture and Convert Leads

Your new marketing strategies are rolling and you're starting to see results. So how do you manage this increased traffic and newfound leads? After the first 60 days, you'll want to shift your focus from marketing and lead generation to converting leads into customers.

### Navigate the nuances of online leads

Refer back to your initial 30-day assessment and consider your audience and their current situation. People who request a rate quote or otherwise engage a lender online may be researching multiple other lenders. They may be comparing you to your competitors or they may simply be looking for an easy place to get financing.

In either case, they're juggling their need for a loan with other responsibilities like work and family, as well as being inundated by the marketing efforts of all other businesses they interact with.

This may feel different than managing referral leads who come with a stronger personal recommendation and expect a certain level of trust with you. Your marketing will do the work to make a credible first impression. But the way you maintain this relationship will impact whether they convert to customers.

The better your sales and marketing process is, the more lead volume you can support, and the better you'll be equipped to help these potential customers.





### Improve your lead processing

From your initial 30-day assessment, look at your documentation about the lead journey. After leads see and engage with your marketing, how is their experience managed?

What does your **lead audience** need to see from you now? Focus on further engaging them and moving them through the pipeline. Send a series of emails, texts, ringless voicemail drops, or even push them to set up a meeting through a scheduling app. In either case, you need to build a system that sets your leads and your business up for success.

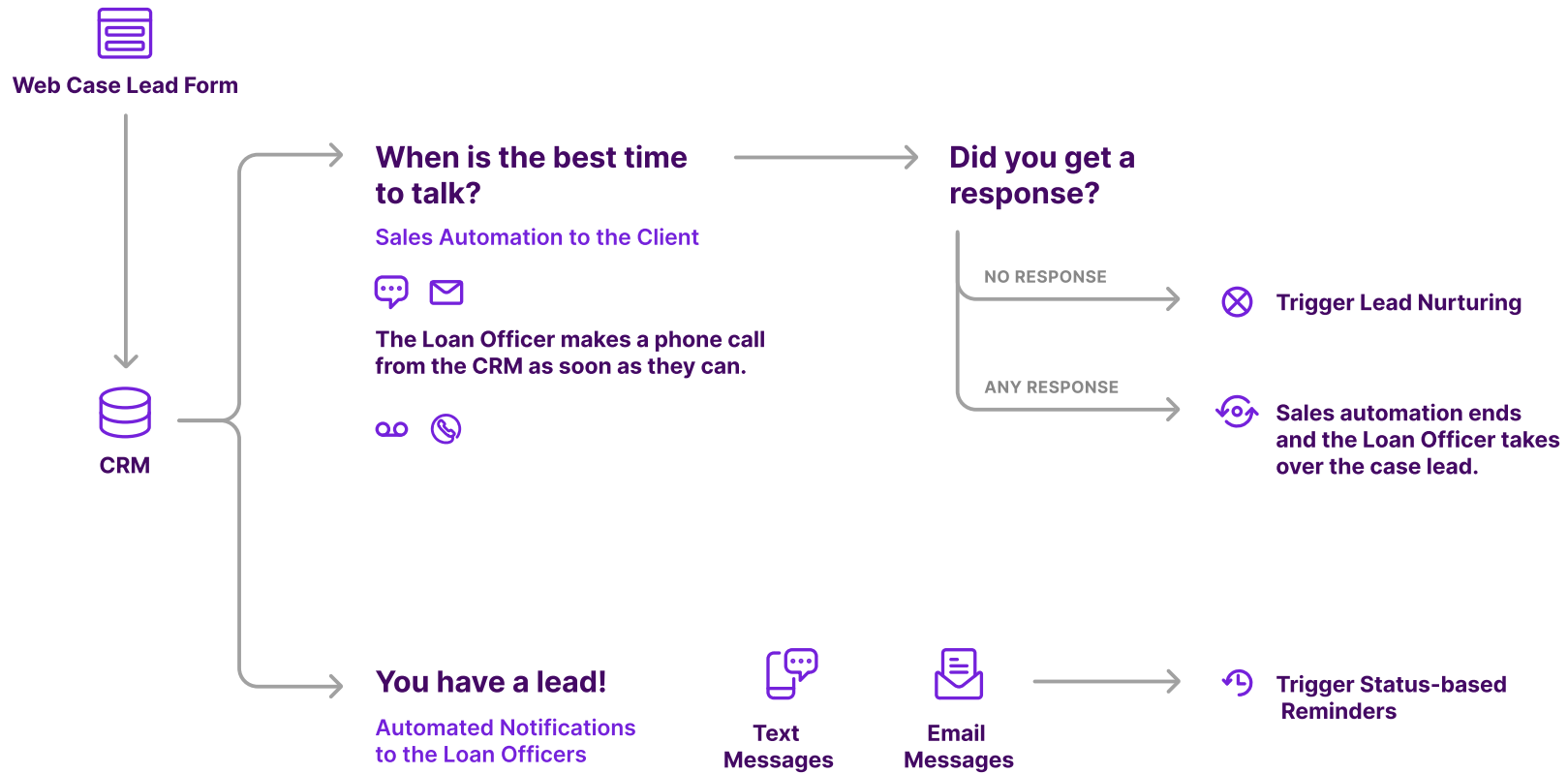
A lead nurturing strategy can get quite complex and be fully automated. But at its simplest you want to do the following:

- Use a CRM and have your leads automatically post into the system to easily track them.
- Send immediate trigger email, text, and/or ringless voicemail messages to the inquiring lead – let them know you got their request and are trying to contact them.
- After this initial outreach, it's important to have automation around each status and pipeline that you manage.

Automating steps of this process helps your team accomplish the small, repetitive follow-ups so they can focus on having productive conversations with potential customers.



## Sales Automation Flow



## Nurture the relationships you're building

Converting online leads takes time, just as many marketing efforts do. You need to reach a prospective customer repeatedly, in the places they already visit. And you need to connect with them in a way that makes them remember you, or better yet, engage with you.

This is where the marketing strategies you built in the first two months continue to sustain your relationship-building through remarketing and audience development.



### EMAILS

Feeding leads into an email list means you'll send them valuable ongoing content every few weeks that they'll connect with as they consider their mortgage needs and possibly compare you to competitors. In each email, remind them that you're their loan expert.



### DIGITAL ADS

With Google and Facebook ads, you can install a platform pixel on your website to drive traffic there. This short code on your website places a cookie in the user's browser and triggers a Google Ad, for example, on other websites they visit, encouraging them to return to your website, even when they weren't actively thinking about their mortgage needs.



### BLOG

Your consistently updated blog gives people a reason to return to your website and engage you further. As you come up in search results when they research their needs and questions or your ads appear while they browse the internet, you consistently show up for them. When they're ready to dig in, you've made it easy for them to get started with you.

## What is your next set of goals?

As you wrap up your quarter-long marketing plan, you should have a high-level, end-to-end marketing and lead conversion process. This process supports your team in not only gaining leads but also successfully managing those leads and converting them to qualified customers who close loans.

It also gives you the infrastructure to scale efforts within your business and bring new loan officers into a successful framework.

With this plan, you'll immediately begin increasing your lead flow and conversion rate. From here you can make this 90-day plan a repeatable and scalable process to continue to strengthen your business.

### How Kaleidico can help

This initial 90-day marketing plan brings on a lot of new opportunities, which also means new challenges. Those willing to take it on experience deliberate and strategic growth.

If you need support in your new marketing efforts, learn more about Kaleidico. With our mortgage marketing expertise, we understand you as well as your audiences. Work with us to execute strategic digital marketing strategies so that you can focus on closing loans.



[Schedule a discovery session with us](#)

Or email [hello@kaleidico.com](mailto:hello@kaleidico.com)