

The Defining Difference
BY CINDY ERTMAN

How to Create Your Annual Strategic Marketing Plan



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Cindy Ertman
The Defining Difference
www.TheDefiningDifference.com
info@CindyErtman.com
Phone: 310-295-1130



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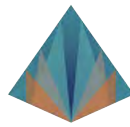
How to Create Your Annual Strategic Marketing Plan

Having a clear mortgage marketing plan is essential for increasing exposure, main-taining an online presence, creating brand awareness, attracting leads, and ultimate-ly increasing the amount of loans you close. A well-rounded marketing plan must be coupled with an effective strategy that you execute daily in order to create the results you desire.

Below are the key components that are essential to developing a marketing plan and, if implemented in tandem, that will help you expand your influence and reach in the marketplace.

SUGGESTED COMPONENTS OF A STRATEGIC MARKETING PLAN:

- **SOCIAL MEDIA MARKETING**
- **VIDEO MARKETING**
- **DATABASE MARKETING**
- **EMAIL MARKETING**
- **DIRECT MAIL MARKETING**
- **EDUCATION/ WORKSHOPS**
- **MONTHLY MASTERMINDS**
- **NETWORKING GROUPS**
- **COMMUNITY EVENTS**
- **LEAD GENERATION**
- **EVENT SPONSORSHIPS**
- **WEBSITE MARKETING**
- **REFERRAL MARKETING**
- **PAID ADS**
- **NEWSLETTERS**
- **DRIP CAMPAIGNS**
- **REALTOR POP-BY'S**
- **CLIENT REVIEWS**
- **ATTENDING CLOSINGS**
- **CLIENT APPRECIATION EVENTS**
- **CO-BRANDED MARKETING**
- **HOST VIRTUAL TRAININGS**
- **ASK FOR REVIEWS/TESTIMONIALS**
- **CLOSING GIFTS**
- **RADIO/TV ADS**
- **PRINT ADS**
- **PODCASTS**
- **BLOGS**



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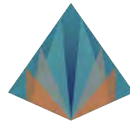
What social media platforms are you currently using?

How often do you post content?

Where do you get the most traction?

Create your social media content calendar with the following in mind:

- Record short videos with answers to your clients most asked questions.
- Record short videos to explain the mortgage loan process, first-time homebuyer tips, the do's and don'ts of home financing, etc.
- Share client testimonials and reviews.
- Highlight "behind the scenes" content of you and your team.
- Incorporate personal posts so that people can get to know you.
- Find opportunities to promote local businesses or charities.
- You can support your Realtor partners by posting a current listing.
- Share upcoming workshops or events.



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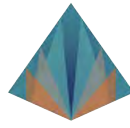
What video marketing strategies are you using currently?

What kinds of email and database marketing campaigns are you using?

(Market updates, Drip campaigns, Newsletters, etc.)

What types of education and/or workshops do you use to demonstrate your expertise in the marketplace? (Lunch-and-Learns, Realtor Masterminds, First-time homebuyer workshops, VA loan workshops, etc.)

How are you incorporating community involvement, events and event sponsorships in your marketing strategy? (Charitable events, sponsoring school fundraising events, etc.)



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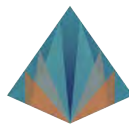
What are you doing to drive buyers and referral partners to your website?

(SEO, Blogging, etc.)

Are you including Referral Marketing in your strategy? (Community or professional networking events, Client appreciation events, etc.)

What tools are you using to support lead generation? (Paid ads, Boosted social media posts, Landing pages, etc.)

Are you using direct mail in your marketing campaigns? (Postcards, Flyers, etc.)



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What 5 things will you commit to implementing in your annual marketing calendar to expand your influence in the marketplace?

1.

2.

3.

4.

5.

SAMPLE MARKETING CALENDAR

JANUARY		FEBRUARY		MARCH	
1ST QUARTER	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors
	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	3 RD Call L&L invites to remind them	3 RD Call L&L invites to remind them
	15 TH Hard Mail Postcard to Past Clients Create title/content for March L&L Batch Social Media Content / Video	15 TH Send 'You're Invited' email invites to Lunch and Learn (L&L) Realtor Pop-By	15 TH Send 'You're Invited' email invites to Lunch and Learn (L&L) Realtor Pop-By	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors
APRIL		MAY		JUNE	
2ND QUARTER	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors
	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors
	15 TH Hard Mail Postcard to Past Clients Create title/content for March L&L Batch Social Media Content / Video	15 TH Send 'You're Invited' email invites to Lunch and Learn (L&L) Realtor Pop-By	15 TH Send 'You're Invited' email invites to Lunch and Learn (L&L) Realtor Pop-By	10 TH Lunch and Learn (L&L)	10 TH Lunch and Learn (L&L)
JULY		AUGUST		SEPTEMBER	
3RD QUARTER	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors
	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors
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OCTOBER		NOVEMBER		DECEMBER	
4TH QUARTER	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors	1 ST Market Update Email to Past Clients & Realtors
	1 ST & 15 TH Market Update Email to Realtors	3 RD Call L&L invites to remind them	3 RD Call L&L invites to remind them	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors
	15 TH Hard Mail Postcard to Past Clients Send 'You're Invited' email invites to Lunch and Learn (L&L)	1 ST & 15 TH Market Update Email to Realtors	1 ST & 15 TH Market Update Email to Realtors	15 TH Hard Mail Postcard to Past Clients Create title/content for March L&L Realtor Pop-By	15 TH Hard Mail Postcard to Past Clients Create title/content for March L&L Realtor Pop-By

ANNUAL MARKETING CALENDAR

JANUARY		FEBRUARY		MARCH		
1ST QUARTER		New Year's Day MLK Jr. Day		President's Day Valentine's Day		Saint Patrick's Day
APRIL		MAY		JUNE		
2ND QUARTER		Easter Good Friday		Memorial Day Mother's Day		Father's Day
JULY		AUGUST		SEPTEMBER		
3RD QUARTER		Independence Day				Labor Day
OCTOBER		NOVEMBER		DECEMBER		
4TH QUARTER		Columbus Day Halloween		Veterans Day Thanksgiving		Christmas Hanukkah



COACHING PROGRAMS FOR LOAN ORIGINATORS



Cindy Ertman

Cindy Ertman is the CEO & Founder of The Defining Difference® a success-based coaching and training company devoted to helping people master the power of intentional choice to create a defining difference in their own lives.

After being acknowledged as one of the Top 100 Most Influential Mortgage Executives in America by Mortgage Executive Magazine for 5 years in a row and being named in the Top 100 Mortgage Loan Originators in the U.S. by Mortgage Originator Magazine for more than a decade, Cindy has now dedicated her life to empowering the growth of others.

Cindy's goal is to help her clients get more out of life by making powerful, intentional choices to propel their income and achieve their peak performance and build connected referral relationships to accelerate their success.

The Defining Difference Coaching Programs

Mortgage Mastermind Elite

- Designed for originating branch managers, seasoned mortgage professionals and Top Producers, MME includes a vetted community of 15 high-performance mortgage professionals where everyone is committed to sharing best practices and results-oriented marketing strategies, building strong referral partners with 'done for you' value materials, and building a high impact team to achieve next level success.
- Schedule your strategy call to learn more: www.MortgageMastermindElite.com

Millionaire Mortgage Club

- Designed for mortgage loan originators at all levels of success. If you want to grow, expand your team and build your referral partner network, this program is for you. MMC is a subscription-based membership program that includes the tools and resources that helped Cindy reach 7-figure success in a LIVE, online, ongoing environment.
- **Special Offer for New Members:** Just \$97 for your first month! (normally \$297/month)
- Learn more and enroll: www.MillionaireMortgageClub.com

Platinum Private Coaching

- Catering specifically to high-performance mortgage loan originators and branch managers who desire private, individual guidance and support in their business and life. Our brilliant team of coaches are seasoned veterans and mortgage leaders, who will help you break through what's holding you back and accelerate your results.
- Schedule your strategy call to learn more. Email info@CindyErtman.com