



**MILLIONAIRE**  
— MORTGAGE CLUB —

## Creating Your Annual Strategic Marketing Plan



**The Defining Difference**  
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## **Creating Your Annual Strategic Marketing Plan**

Having a clear mortgage marketing plan is essential for increasing exposure, maintaining an online presence, creating brand awareness, attracting leads, and ultimately 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**



## Creating Your Annual Strategic Marketing Plan

**What social media platforms are you currently using?**

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**How often do you post content?**

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**Where do you get the most traction?**

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**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.



## Creating Your Annual Strategic Marketing Plan

**What video marketing strategies are you using currently?**

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

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

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**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.)

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**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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## Creating Your Annual Strategic Marketing Plan

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

(SEO, Blogging, etc.)

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

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

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

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## Creating Your Annual Strategic Marketing Plan

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

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5. \_\_\_\_\_

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# SAMPLE MARKETING CALENDAR

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

# 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		