



First Heritage Mortgage Services

2020 Mortgage Marketing Checklist

Ongoing Promotions

1. Promote mortgage solutions on your website

- a. Is it easy for members to find your mortgage program information?
- b. Do you have a dedicated product page? [View an example here](#)
- c. Is there a mortgage banner on your home page? [Request your free, customizable web banners through our partner portal now.](#)

2. Give staff tools to tell members about the mortgage solutions you offer

The experts at First Heritage Mortgage Services are here to answer detailed questions and guide your members through the process, but all staff should know the basics so they can refer members to us and help them make their dream home a reality. [Access staff training resources in our partner portal.](#)

3. Share home buying tips on social media

First Heritage makes it easy with free, read-to-post content on home buying. [Download the latest social content today in our partner portal.](#)

4. Include mortgage program information in your regular communications

Building awareness takes time and many members may not realize their credit union is the best place to turn for home loans. Including information in your quarterly newsletters and other ongoing communications can be a big help. [Download your free, customizable newsletter ad in our partner portal.](#)

Targeted, Seasonal Activities

- 1. Plan to increase your promotional activities during Peak Home Buying Season**
Although there are some regional variations, peak home buying season typically begins in late March and goes through the summer or until school starts in your area.
- 2. Order updated materials for your branches**
Simple actions like updating your in-branch posters or digital signage each spring to focus on your mortgage solutions can make a big difference in member awareness. [Order the latest, customizable posters in our partner portal.](#)
- 3. Send targeted emails to likely home buyers within your membership**
We recommend starting with basic demographic information such as age range, income and whether the member is a homeowner already, if available. By segmenting your members, you can create customized messages to target likely first-time buyers, those who may be interested in refinancing or downsizing. [Download our free, customizable email copy in the partner portal to get started.](#)
- 4. Include mortgages in your on-hold messages**
First Heritage makes it easy with a ready-to-record [on-hold script, available free in our partner portal.](#)
- 5. Target non-members in your area through digital & social ads**
 - a.** If your credit union serves members within certain zip codes or even select employers, you may find that geo-targeted digital ads via Google or Facebook can be an effective way to communicate with the right target audience
 - b.** Try promoting a specific offer or closing cost discount for a limited time to measure effectiveness
 - c.** Be sure to ask members how they heard about you and utilize our [customizable digital and social banners](#) to help you get started.
- 6. Host a home buying seminar & consider building your realtor network**
Local realtors are often happy to work with your credit union to help educate first-time homebuyers on the process. First Heritage can also supply support and information to assist you in bringing in potential borrowers for educational events.

Leveraging First Heritage's Turnkey Marketing Materials

- 1. Review the latest, customizable marketing materials available for your use

Just login to the partner portal and click on “Customized Marketing” to begin leveraging First Heritage’s turnkey marketing materials. Print materials have a fee, but many of the digital resources are available free of charge.

NEW Marketing Materials Now Available!

Strengthen member loyalty and earn more first mortgage business by promoting your program this spring and summer.

First Heritage offers a variety of advertising options to communicate the benefits and savings members will experience – all branded for your Credit Union. **New for Spring 2019:** Choose from 3 featured images and 3 color options for a more customized marketing campaign.

[Login to your Partner Portal](#) to browse through the full-range of graphics now available and [place your order today!](#)

- 2. Need something custom for your credit union? Just ask

Everyone needs a little help sometime. If peak home buying season ends up being peak everything else season for your in-house marketing team, please reach out. First Heritage’s marketing team can help supplement your resources and serve as an outsourced partner to help ensure marketing mortgages remains a priority.

Evaluating Results & Maintaining Awareness

✓ **1. Measure your effectiveness to focus more on what works**

Keep track of direct member inquiries, clicks on your mortgage program page, email open rates and other key statistics to help you understand what's working.

✓ **2. Encourage referrals and repeat business**

While your members aren't likely in the market to buy a house regularly, their recommendations to friends, family and co-workers can go a long way. Plus, when it comes time to refinance, move or downsize, your members will think of you first if you're consistently reaching out. Consider an automated email series to touch base quarterly to thank members and remind them you're here for their mortgage needs.

□ **3. Let First Heritage know how we can help**

Remember, the CUSO is here to support your mortgage program. Contact us at info@firstheritage.org if there are other resources we can provide to help you build member loyalty and capture more first mortgage business in your area.