

2020 MORTGAGE MARKETING PLAN

BUILD AWARENESS
INCREASE LOYALTY

TARGET: CURRENT & POTENTIAL CREDIT
UNION MEMBERS

Implementing this 12-month marketing bundle will help your credit union build awareness, increase mortgage loans, and enhance member loyalty. **Login to the Partner Portal** at firstheritage.org to download your free digital assets today.

MEMBER COMMUNICATIONS	ORDER	LIVE DATE	12-MONTH ACTIVITIES	ORDER	LIVE DATE
ORDER SPRING MARKETING MATERIALS (POSTERS, ETC.)	Jan. 7th	February 24	PROMOTE MORTGAGES ON YOUR WEBSITE - PRODUCT PAGE (VIEW SAMPLE) & WEB BANNER (ORDER)	Jan 3 rd - <i>refreshing banners 3x per year</i>	Jan 22 - Refi March 23 - Home Buying Sept 30 - General
SEND TARGETED EMAILS TO POTENTIAL HOMEBUYERS	Feb. 26	March 3rd			
USE DIGITAL & SOCIAL ADS	March 4	April 2nd	STAFF EDUCATION & TRAINING (ACCESS ONLINE)	February 4	February 28
PROMOTE MORTGAGES VIA ON-HOLD MESSAGES	March 6	April 3rd	SHARE HOMEBUYING TIPS ON SOCIAL MEDIA (DOWNLOAD)	March 2	March 18 (continue through Sept)
HOST A HOMEBUYING SEMINAR	March 16	April 17	INCLUDE MORTGAGES IN YOUR NEWSLETTER (DOWNLOAD)	March 9	Apr, July, Oct, Jan (Quarterly)
REFINANCE CAMPAIGNS	FH To Notify	Driven by Rates			

JANUARY							FEBRUARY							MARCH							APRIL							MAY							JUNE										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
			1	2	3	4							1	1	2	3	4	5	6	7				1	2	3	4						1	2		1	2	3	4	5	6				
5	6	7	8	9	10	11	2	3	4	5	6	7	8	8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13				
12	13	14	15	16	17	18	9	10	11	12	13	14	15	15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20				
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27				
26	27	28	29	30	31		23	24	25	26	27	28	29	29	30	31					26	27	28	29	30			24	25	26	27	28	29	30	28	29	30								
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JULY							AUGUST							SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER										
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S				
			1	2	3	4							1			1	2	3	4	5						1	2	3	1	2	3	4	5	6	7						1	2	3	4	5
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