

FHA Mortgage Campaign

Affiliate: BCB BCM BCFS PAR PIA PF

Start Date: 2/22/2021 **End Date:** 3/22/2021

Target Market

- Renters with HH income greater than 60k
- All of RI
- Bristol, Plymouth, Norfolk Counties in MA
- Local Realtors in these areas

Objectives

- | | |
|---|---|
| <input checked="" type="checkbox"/> Increase revenue/profit | <input checked="" type="checkbox"/> Increase sales |
| <input checked="" type="checkbox"/> Increase # of new accts/relationships | <input type="checkbox"/> Launch new products or services |
| <input type="checkbox"/> Grow market share | <input checked="" type="checkbox"/> Target new customers |
| <input checked="" type="checkbox"/> Increase product awareness | <input checked="" type="checkbox"/> Build brand awareness |
| <input type="checkbox"/> Improve customer loyalty | <input checked="" type="checkbox"/> Launch an advertising campaign |
| <input checked="" type="checkbox"/> Encourage word of mouth | <input type="checkbox"/> Retain existing profitable customers |
| <input type="checkbox"/> Offer existing customers exclusive offers | <input checked="" type="checkbox"/> Ensure business stays fresh/new |
| <input type="checkbox"/> Enter new markets | <input type="checkbox"/> Improve internal communications |
| <input type="checkbox"/> Improve stakeholder relations | <input type="checkbox"/> Launch a PR campaign |
| <input type="checkbox"/> Enhance customer relationships | <input type="checkbox"/> Make customers feel more valued |

Goals

To communicate to the market that our FHA process is more streamlined and easier.
Gain \$1,000,000 in total amount of new FHA mortgage accounts by 4/30/2021.

Strategy

Print:

- Newspaper Ad
- Press Release
- Brochures
- Rack Card/Buckslip
- Flyer
- Community boards
- Static Billboard
- Letter
- Postcard
- SOCO Ad
- Chamber Ad
- 2.5x4 Banner
- 2.5x6 Banner
- 4x8 Banner
- Lapel buttons
- Lapel ribbons
- Lapel stickers
- Lawn signs
- Annual Report article

Digital:

- Television
- Digital Billboard
- Statement insert
- Internal digital screens
- External digital screens
- Email Automation
- Acquisition Email
- Constant Contact Email
- Landing Page/Page update
- Mobile app image
- Promotion Suite Ad
- Google Ads
- Web banner
- ITM Image/Scrolling Text

Social Media:

- FB Post
- FB Boost
- FB Cover
- TW Post
- LI Cover
- LI Post
- IG
- IG Post
- YT Video

Misc:

- Telephone solicitation
- Fax solicitation
- Radio
- Telephone banking
- Marketing Update
- Image on Nick's Blog
- Lunch/refreshments
- Photoshoot needed

Tactics & Accountability

Tactic	Due Date	Responsibility	Status
Coordinate press release with PRFirst with Nick's highlights (in email)	3/3/21	Carrie	COMPLETE
Develop all campaign creative	3/4/21	Kaitelyn	COMPLETE
Create email template	3/4/21	Kaitelyn	COMPLETE
Get Compliance approval	3/19/21	Kaitelyn	COMPLETE
Obtain realtor list in Salesforce for email	3/19/21	Tim	COMPLETE
Post to Nick's Blog	3/19/21	Whitney	COMPLETE
Post BCB and BCM Web banners, BCM home page image, and make FHA page update	3/19/21	Carrie	COMPLETE
Schedule social posts/ draft lead-ins	3/19/21	Whitney/ Carrie	COMPLETE
Deploy email	3/19/21	Whitney	COMPLETE
Post Marketing Update to Teams	3/19/21	Kaitelyn	COMPLETE
Resend emails to un-opens	3/24/21	Whitney	COMPLETE
Consumer target list with income threshold and renting in areas Nick mentioned (above)	3/19/21	Tim/Agency	COMPLETE
Link campaigns and lists in salesforce to track/need GA, FB and meltwater for metrics	3/19/21	Tim	COMPLETE
Social sponsored ads (FB & Insta)	3/19/21	Whitney	COMPLETE

Results

Did we meet the goal? Yes No

Total amount of new mortgage accounts tied to campaign: \$3,552,866.00

****Corresponding Collateral on the following pages****

Corresponding Collateral

Constant Contact Email #1

Email going to realtors (Tim to pull list from CRM)

From: BayCoast Mortgage Company LLC <applynow@baycoastbank.com>

Reply applynow@baycoastbank.com

Subject: **Now Direct Endorsed by the FHA**

Preheader: **Offering More Competitive Rates Often With A Lower Down Payment**



Flexible FHA Mortgage Loans

Now Direct Endorsed by the FHA

BayCoast Mortgage Company is fully endorsed by the Federal Housing Administration (FHA) which allows our lenders to meet the high demand for FHA-insured loans, while also **making the process of applying more efficient.**

Under the Direct Endorsed (DE) program, we are able to underwrite for the FHA directly, giving us the ability to review and certify mortgage documents for FHA.

Because of this endorsement, we can offer **more competitive interest rates** and are capable of increased efficiencies when issuing FHA-insured loans. **Processing, underwriting, and decision-making is now in-house**, which aligns with our mission of providing exceptional customer-centric service.

This designation allows us to assist a broader range of customers in-house. **FHA loans often allow for a lower down payment than on other types of mortgages, especially in owner-occupied multi-unit transactions.**

Do you know anyone in your network that is thinking of purchasing or refinancing?

Please share this news with them and the information below!



Call 877-466-2678
to speak to a representative



Email applynow@baycoastbank.com
with any questions you may have



Visit www.BayCoastMortgage.com
to start the application process



This is an advertisement. All loans subject to credit approval. Program guidelines and rates are subject to change without notice. New Jersey—BayCoast Mortgage Company, LLC, 330 Swansea Mail Drive, Swansea, MA 02777, 877-466-2678, Licensed Mortgage Banker- NJ Banking and Insurance Department New Hampshire—Licensed by the New Hampshire Banking Department #19631-MS Rhode Island—Rhode Island Licensed Lender Virginia - BayCoast Mortgage Company, LLC, NMLS #1082048 (<http://www.nmlsconsumeraccess.org>).

BayCoast
MORTGAGE
COMPANY, LLC



www.BayCoastMortgage.com

BayCoast Mortgage Company | One BayCoast Place, 330 Swansea Mail Drive, Swansea, MA 02777

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Sent by applynow@baycoastbank.com powered by

**Constant
Contact**

Try email marketing for free today!

Social Posts



BayCoast
MORTGAGE
COMPANY, LLC

Flexible FHA Mortgage Loans
Now Direct Endorsed by the FHA

- More competitive interest rates
- In-House processing, underwriting, & decision-making
- Allows for a lower down payment
- Allows for a broader range of borrowers with expanded credit & income requirements

Social post lead-ins:

1. Are you looking for a more competitive rate with a lower down payment during your home search? Learn more about our FHA Mortgage Loans here:
<https://www.baycoastmortgage.com/home/mortgages/fhaloans>
2. BayCoast Mortgage is fully endorsed by the Federal Housing Administration (FHA), making the process of applying for FHA loans more efficient than ever before! Share with friends and family to make their homeownership dreams a reality:
<https://www.baycoastmortgage.com/home/mortgages/fhaloans>
3. When issuing FHA loans, processing, decision-making, and underwriting is now completed 100% in-house. Explore the benefits of an FHA loan today:
<https://www.baycoastmortgage.com/home/mortgages/fhaloans>
4. Streamline refinancing for an existing FHA loan, with the potential to lower your interest rate or shorten your term, with or without an appraisal! Find out how you can save:
<https://www.baycoastmortgage.com/home/mortgages/fhaloans>
5. Offering you a better deal and a more efficient process when purchasing your first home, FHA loans have been helping people become homeowners since 1934. Learn more about how we can help, or apply today: <https://www.baycoastmortgage.com/home/mortgages/fhaloans>

Image on Nick's Blog



BayCoast
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Web Banner (BCB)



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CLICK TO LEARN MORE »

To link to: <https://www.baycoastmortgage.com/home/mortgages/fhaloans>

Web Banner (BCM)



Static image, not clickable

Home Page Image Link (BCM)



To link to: <https://www.baycoastmortgage.com/home/mortgages/fhaloans>

BCM FHA Website Update

FHA Loans

Looking to Buy?

FHA Loans have been helping people become homeowners since 1934. How do we do it? The Federal Housing Administration (FHA) – which is part of HUD – insures the loan so we can offer you a better deal!

Flexible Guidelines and Lower Down Payments

BayCoast Mortgage Company is fully endorsed by the Federal Housing Administration (FHA) which allows our lenders to meet the high demand for FHA-insured loans, while also making the process of applying more efficient.

Under the Direct Endorsed (DE) program, we are able to underwrite for the FHA directly, giving us the ability to review and certify mortgage documents for FHA.

Because of this endorsement, we can offer more competitive interest rates and are capable of increased efficiencies when issuing FHA-insured loans. Processing, underwriting, and decision-making is now in-house, which aligns with our mission of providing exceptional customer-centric service.

This designation allows us to assist a broader range of customers in-house. FHA loans often allow for a lower down payment than on other types of mortgages, especially in owner-occupied multi-unit transactions.

<<FHA YouTube Video Here>>

All loans subject to credit approval. Program guidelines and rates are subject to change without notice.

Internal Marketing Update via Teams

BayCoast Mortgage Company Now FHA Direct Endorsed

We are happy to announce the Federal Housing Administration (FHA) now fully endorses BayCoast Mortgage Company, which allows our lenders to meet the high demand for FHA-insured loans, while also making the process of applying more efficient.

Under the Direct Endorsed (DE) program, lenders for FHA-insured loans, such as BayCoast Mortgage Company, underwrite for FHA directly, rather than the agency itself. These privileges demonstrate the lenders' ability to review and certify mortgage documents for FHA. Lenders undergo a two-year application process to become DE lenders.

As a result of the FHA DE Approval, BayCoast Mortgage can offer more competitive interest rates and is capable of increased efficiencies when issuing FHA-insured loans. Processing, underwriting and decision-making is now in-house, which aligns with our mission of providing our exceptional customer centric service.

This designation allows BayCoast Mortgage to assist a broader range of customers in-house. FHA loans often allow for a lower down payment than on other types of mortgages, especially in owner-occupied multi-unit transactions.

"FHA Direct Endorsed Approval is a privilege that underscores our qualifications, experience and expertise to underwrite mortgage loans that satisfy FHA requirements," said Daniel Briand, President & CEO of BayCoast Mortgage.

We will be communicating this important announcement to our community through a press release, social media posts, an email to renters and local realtors, and information will be added to the BayCoast Mortgage website (which can be found [here](#).) If you see the social media posts in your feed, feel free to like, share, and comment to tell your family and friends and help us spread the word!

Postcard

Purchased renter's list, suppressed existing customers



BayCoast
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Flexible FHA Mortgage Loans

Now Direct Endorsed by the FHA

30-Year FHA Fixed-Rate Mortgage	2.875% INTEREST RATE
	3.572%* APR

 *APR refers to Annual Percentage Rate and is based on a 30-year \$250,000 loan where mortgage insurance is not required. Your actual interest rate and APR may vary. Interest rates offered are valid as of 3/15/21 and subject to change. Program guidelines may change without notice. All loans subject to credit approval. BayCoast Mortgage Company is a Massachusetts and Rhode Island licensed lender. Also licensed in CT, NH, NJ, MD, PA, SC, NC, VA, and FL.



BayCoast Mortgage Company LLC
330 Swansea Mall Drive
Swansea, MA 02777

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-  **Call 877-466-2678**
to speak to a representative
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with any questions you may have
-  **Visit www.BayCoastMortgage.com**
to start the application process

TURN YOUR RENT INTO AN INVESTMENT

Constant Contact Email #2

Email went to existing customers (renters), 372 individuals

Subject	GREAT NEWS! 📣 We Are Now Direct Endorsed by the FHA
Pre header	Offering More Competitive Rates Often With A Lower Down Payment
From name	BayCoast Mortgage Company LLC
Sent	April 15th 2021 at 12:14 pm EDT
From Address	applynow@baycoastbank.com



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Are you or anyone you know thinking of purchasing or refinancing?

Contact a team member today to discover how you could benefit from an FHA loan!

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www.BayCoastMortgage.com

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