

# Second Home Mortgage Campaign

**Affiliate:**  BCB  BCM  BCFS  PAR  PIA  PF

**Start Date:** 4/5/2021 **End Date:** 5/31/2021

**Prepared by:** Kaitelyn Ploude **Overall Accountability:** Marketing Dept

## Target Market

- MA & RI – can include Boston counties and expand reach because rate is low
- High net worth
- 5+ years in home
- More affluent counties – suppress Fall River, New Bedford, Taunton, Brockton and lower income areas (postcard only)
- Suppress Chase team
- Target existing customers

## 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 checked="" 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 checked="" type="checkbox"/> Offer new customers exclusive offer   | <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

Gain \$1,000,000 in total amount of new mortgage accounts by 6/30/2021.

## Strategy

### Print:

- Newspaper Ad
- Press Release
- Brochures
- Rack Card/Buckslip
- Flyer
- Community boards
- Static Billboard
- Letter
- Postcard
- SOCO Ad (June)
- Chamber Ad (June)
- NB Guide Ad
- 2.5x4 Banner
- 2.5x6 Banner

### Digital:

- Television
- Digital Billboard
- Statement insert
- Internal digital screens
- External digital screens
- Email Automation
- 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 Post
- YT Video

### Misc:

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

- 4x8 Banner
- Lapel buttons
- Lapel ribbons
- Lapel stickers
- Lawn signs
- Annual Report article

## Tactics & Accountability

<b>Tactic</b>	<b>Due Date</b>	<b>Responsibility</b>	<b>Status</b>
Draft social/ad captions/lead-ins	4/15/21	Whitney	COMPLETE
Develop Creative	4/27/21	Kaitelyn	COMPLETE
DocuSign Campaign & MAP	4/28/21	Kaitelyn	COMPLETE
Send ads to SOCO & Chamber	4/28/21	Kaitelyn	COMPLETE
Upload flyer to SF Case for LOs	4/28/21	Kaitelyn	COMPLETE
Open Tech Case to have ITM message uploaded	4/28/21	Kaitelyn	COMPLETE
Share campaign details with Contact Center for proper call handling	4/28/21	Kaitelyn	COMPLETE
Deploy promo suite ad	4/29/21	Tim	COMPLETE
Send Mobile App images to Mitch	4/29/21	Tim	COMPLETE
Create landing page on BCM site, upload BCB web banner, upload BCM web banner & homepage image	4/29/21	Kaitelyn	COMPLETE
Obtain list for postcard	5/3/21	Tim	COMPLETE
Obtain list for email	5/3/21	Tim	COMPLETE
Link campaigns and lists in Salesforce to track/need GA, GB and meltwater for metrics	5/3/21	Tim/Whitney	COMPLETE
Post Marketing Update	5/3/21	Kaitelyn	COMPLETE
Send creative to RAIN for display ads/PPC. Send details of offer to write copy/lead-ins.	5/3/21	L'Oreal/Kaitelyn	COMPLETE
Deploy digital screens to branches	5/3/21	L'Oreal/Kaitelyn	COMPLETE
Schedule social media posts/ads	5/3/21	Whitney	COMPLETE
Schedule Constant Contact email for deployment, update Contact Center	5/3/21	Whitney	COMPLETE
Post image to Nick's Blog	5/3/21	Whitney	COMPLETE
Send HiFi email to Lead Mailbox Contacts, update Contact Center	5/7/21	Agency/Kaitelyn	COMPLETE
Send postcard to mail house, update Contact Center	5/7/21	Kaitelyn	COMPLETE
Re-send email to all un-opens	5/10/21	Whitney	COMPLETE

## Results

Did we meet the goal?  Yes  No

Total amount of new mortgage accounts tied to campaign: \$2,612,000.00

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

## Corresponding Collateral

### 1.) Flyer

Loan Officers to print as needed; Will be sent to Branches to display in lobby



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COMPANY LLC  
BayCoastMortgage.com • 877-466-2678

## Coast to Closing™ on a Second Home

Whether you're  
buying a new home  
or your vacation  
getaway, we can help!

**\$500  
CREDIT  
AT CLOSING**

**Contact us to lock in your low rate today!**



**Call 877-466-2678**  
to speak to a representative



**Email [applynow@baycoastbank.com](mailto:applynow@baycoastbank.com)**  
with any questions you may have



**Visit [www.BayCoastMortgage.com](http://www.BayCoastMortgage.com)**  
to start the application process

**30-Year**  
Conventional Mortgage

**3.000%**  
FIXED

**3.035%\***  
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 4/26/2021 and subject to change. Program guidelines may change without notice. Applies to purchase transactions only. All loans subject to credit approval. \$500 closing cost credit cannot be combined with any other offer. Must apply by September 30, 2021. The \$500 credit will be issued at the time of settlement. BayCoast Mortgage Company is a Massachusetts and Rhode Island licensed lender. Also licensed in CT, NH, NJ, MD, PA, SC, NC, VA, and FL.

## 2.) Postcard

Currently working on obtaining the postcard list



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Equal Housing Lender

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**Coast to Closing™ on a Second Home**

If you're looking to purchase your perfect vacation home, BayCoast Mortgage is here to help you through every step of the mortgage process. Our talented team of mortgage professionals will listen to your needs and secure financing that fits within your budget to make your dreams a reality.

**Contact us to lock in your low rate today!**

-  **Call 877-466-2678**  
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-  **Email [applynow@baycoastbank.com](mailto:applynow@baycoastbank.com)**  
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**BayCoast Mortgage Company LLC**  
One BayCoast Place  
330 Swansea Mall Drive  
Swansea, MA 02777

### 3.) SOCO Magazine Print Ad

\* To be included in the June issue\*



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## 4.) One Southcoast Chamber Ad

\* To be included in the June issue\*



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## 5.) Digital screens (branches)

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**\$500 CREDIT AT CLOSING**

**30-Year Conventional Mortgage**  
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**3.035%\*** APR

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## 6.) Landing Page on BayCoast Mortgage Website (mock-up)

**BayCoast**  
MORTGAGE COMPANY, LLC

Toll Free: Swansea: 877-466-2678

Like LinkedIn Search

**Apply Now!**

Home About Us Our Products Staff Directory Contact Us Our Process 1st Time Home Buyers

About Us

**Contact Us**  
Learn More About Our Mortgage Services  
**Contact Us**

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If you're looking to purchase your perfect vacation home, BayCoast Mortgage is here to help you through every step of the mortgage process.

Our talented team of mortgage professionals will listen to your needs and secure financing that fits within your budget to make your dreams a reality.

**Contact us to lock in your low rate today!**

- ◆ Call us at 877-466-2678.
- ◆ Email us at ApplyNow@baycoastbank.com
- ◆ Click the "Contact Us" button above to share information with us.
- ◆ Ready to apply? Click here to get started with the application process.

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## 7.) Constant Contact Email

Email list will be internal customers (Bankography); Lead Mailbox list

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

Reply: applynow@baycoastbank.com

Subject: Looking for a second home to get away? We can help!

Preheader: Find Your Home Away From Home



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If you're looking to purchase your perfect vacation home, BayCoast Mortgage is here to help you through every step of the mortgage process.

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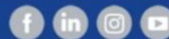


Visit [www.BayCoastMortgage.com](http://www.BayCoastMortgage.com)  
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This is an advertisement. \*APR refers to Annual Percentage Rate and is based on a 30-year \$250,000 loan where mortgage insurance is not required. Your actual interest rate and APR may vary. Interest rates offered are valid as of 4/26/2021 and subject to change. Program guidelines may change without notice. Applies to purchase transactions only. All loans subject to credit approval. \$500 closing cost credit cannot be combined with any other offer. Must apply by September 30, 2021. The \$500 credit will be issued at the time of settlement. BayCoast Mortgage Company is a Massachusetts and Rhode Island licensed lender. Also licensed in CT, NH, NJ, MD, PA, SC, NC, VA, and FL.

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

[Unsubscribe {recipient's email}](#)

[Update Profile](#) | [Customer Contact Data Notice](#)

Sent by applynow@baycoastbank.com powered by



Try email marketing for free today!

## 8.) Mobile App Image

Phone



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**\$500 CREDIT AT CLOSING**

**30-Year Conventional Mortgage**  
**3.000%** FIXED  
**3.035%\*** APR

\*APR refers to Annual Percentage Rate and is based on a 30-year \$150,000 loan where mortgage insurance is not required. Your actual interest rate may vary. Interest rate (APR) and rate as of 6/16/2021 are subject to change. Program subject to change without notice. Subject to approval and restrictions only. See local regulations for credit details. \$500 closing cost credit may be combined with other offers. Offer valid by September 30, 2021. The \$500 credit will be issued on the first day of settlement. BayCoast Mortgage Company is a Massachusetts and Rhode Island licensed lender. Also licensed in CT, PA, NJ, MD, VA, SC, NC, VA, and FL.



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AT CLOSING

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Conventional Mortgage

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APR

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**9.) Promotion Suite Ad/BCB Online Banking**

Home Location (top); To link to landing page on BCM website (see #6 above)



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**\$500 CREDIT AT CLOSING**

**30-Year**  
Conventional Mortgage

**3.000%** **3.035%**  
FIXED APR

**10.) Google Ads/Display Ads ON HOLD**

ALL Google Ads/Display Ads will link to landing page on BCM website (see #6 above)

300x250



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320x50



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**3.000%** **3.035%**  
FIXED APR

320x480

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Conventional Mortgage

<b>3.000%</b> FIXED	<b>3.035%</b> APR
------------------------	----------------------

480x320

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------------------------	----------------------

728x90

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------------------------	----------------------

1080x1080



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1080x1920



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1200x628

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FIXED

**3.035%**  
APR

**11.) Web Banner (Bank Website)**

*To link to landing page on BCM website (see #6 above)*

BayCoast  
MORTGAGE COMPANY LLC

**Coast to Closing™ on a Second Home**

**\$500** CREDIT AT CLOSING

Contact us to lock in your low rate today »

**12.) Web Banner (Mortgage Website)**

*Static image - cannot link anywhere but homepage will feature a clickable button (below).*

BayCoast  
MORTGAGE COMPANY LLC

**Coast to Closing™ on a Second Home**

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Contact us to lock in your low rate today!

### 13.) Home Page Button Ad (Mortgage Website)

To link to landing page on BCM website (see #6 above)



### 14.) ITM Digital Ads & Scrolling Text

Digital Ad Image



Scrolling Text: Coast to Closing™ on a Second Home! Now offering \$500 credit at closing. Call 877-466-2678 or visit [www.BayCoastMortgage.com](http://www.BayCoastMortgage.com) to lock in your low rate today!

### 15.) Image on Nick's Blog

A large advertisement banner. The top left features the BayCoast Mortgage Company logo in white and yellow on a dark blue background, with the website 'BayCoastMortgage.com' and phone number '877-466-2678' below it. The top right shows a stone house on a rocky cliff overlooking the ocean. The bottom left has white text on a dark blue background: 'Whether you're buying a new home or your vacation getaway, we can help!'. The bottom center features '\$500 CREDIT AT CLOSING' in large white font. The bottom right is a white box with a dark blue background containing mortgage rates: '30-Year Conventional Mortgage', '3.000% FIXED', and '3.035%\* APR'.

Whether you're buying a new home or your vacation getaway, we can help!

**\$500 CREDIT AT CLOSING**

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**3.035%\* APR**

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## 16.) Social Media Posts

Text in each post to link to landing page on BCM website (see #6 above)

Lead Ins:

1. Make your dreams a reality this summer, with financing that fits your budget! Let's discuss your low rate today: **\*\*\*link\*\*\***
2. Now is the perfect time to find your home away from home. If you're looking to purchase a vacation home without breaking the bank, we can help! Visit **\*\*\*link\*\*\*** to get started.
3. Low rates, a \$500 closing credit, and an experienced team to help you through every step of the way! Let's get started with purchasing your perfect home: **\*\*\*link\*\*\***
4. Buying a new home? Searching for a vacation getaway this year? Contact us today and Coast to Closing! **\*\*\*link\*\*\***
5. The perfect vacation home is out there, and our team of mortgage professionals will make financing it a breeze. Don't miss out on these great 30-year rates, and a \$500 closing credit bonus! Apply today: **\*\*\*link\*\*\***



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## **17.) Marketing Update**

*To be shared with all employees after launch via Marketing Channel in Teams*

### **Second Home Mortgage Campaign**

Rates are still super low and with the nice weather here (finally!!) we are excited to announce a new mortgage campaign for customers looking to purchase – whether it be a new home or a vacation getaway! Until the end of May, we'll be promoting BayCoast Mortgage Company's Conventional 30-Year Fixed rates.

This promotion will include emails to customers, digital advertisements, a postcard, social media posts, web banners, and much more! Check out the landing page on the BayCoast Mortgage website [here](#) for more details. Also, if you see any of our social posts, be sure to like, share, and comment to help share the news with our community!

Customers can begin the mortgage process by visiting [www.BayCoastMortgage.com](http://www.BayCoastMortgage.com) or they can schedule an appointment with a Loan Officer. If you have any questions about this campaign, please reach out to our friends at BayCoast Mortgage!

## **18.) Contact Center and ITM Notification Email**

Hi all,

I hope all is well with each of you! We are launching a new campaign for BayCoast Mortgage and are expecting an uptick in call volume over the next few weeks so we wanted to be sure your team had a heads up.

Attached you'll find our Marketing Action Plan (MAP) for this campaign. There are multiple pieces to this campaign from a postcard to digital ads and more. In the next couple of weeks, we will be rolling this campaign out piece by piece so you may notice more calls than usual following the drop of the email and postcards. We will be sure to communicate the drop dates of these pieces once we have that part finalized.

If you have any questions about this campaign, please feel free to reach out to us!

Best,