



PHASE 2

content + social strategy

January 2020



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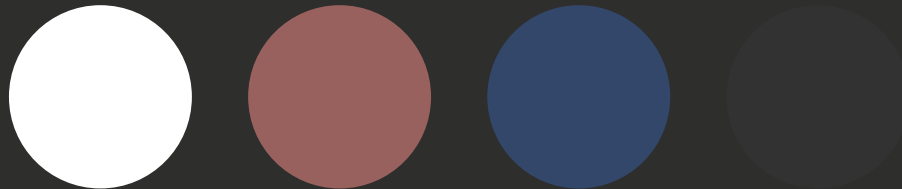


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NMLS #440092

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call to action

is your mortgage clear?

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let's find out



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target demographics

2

first-time home buyers

THE STATS

- Age 25-34 (Millennials)
- Average Age is 32
- 86% have a Mortgage.
- Average loan size is \$345k
- 30% are single. 67% are couples
- 50% of couples have kids
- 80% buy single standing homes .
- 20% buy medium density
- 80% buy established homes.
- 20% buy new homes
- 20% have 2 bedrooms.
- 60% have 3 bedrooms .
- 20% have 4+ bedrooms.
- 90% are full time employed
- 75% have a Tertiary qualification or trade accreditation
- 60% are in dual income households
- **71% engage in social media daily**
- **23% spend more than 3 hours on social media per day**

MEDIA CONSUMPTION

Majority online – Instagram, Facebook, Snapchat, Twitter, Pinterest, Youtube, Spotify
Television – Primarily Netflix and Catchup

GENERAL TRAITS:

- Spend a lot of time on phone/laptop/ devices
- Tech Savvy – they like the newest tech
- Work from home regularly
- Masters of Multi-tasking
- Work-Life balance is important
- Strong sense of Community
- Environmentally and Health Conscious
- Typically Non Religious
- Seek advice on purchases from family & friends

HOW TO MARKET TO FIRST HOME BUYERS

- Video Heavy
- Honest copy.
- **We'll focus on word of mouth – they seek advice from family and friends & online reviews.**
- Fast response times – they expect it.
- We'll be authentic. They are keenly aware of what is marketing speak vs real talk.



the upgraders

THE STATS

- Age 35-59 (Generation X)
- Predominantly Family's with younger kids
- Account for approx 40% of all housing loans
- The largest property buyer demographic
- Adult children are living at home for longer

MEDIA CONSUMPTION

- Majority online - Instagram, Facebook, News Websites, Pinterest, Youtube, Spotify.
- Magazines on cooking, sport, health, travel, parenting, psychology
- Television News and Current Affairs, kids TV
- Newspapers - weekend paper and local weekly papers

GENERAL TRAITS

- Typically families with 2 or more school aged kids
- Busy daily lifestyles - work/school, drop offs, sports, cooking, cleaning etc
- 2 cars, multiple bikes, sports equipment etc - need for storage space
- Often have a family pet or pets
- Kids spend a lot of time with screens/ technology
- Health Conscious. Parents want a healthy lifestyle for their kids

- Clean environment is important
- Safety/Security is important

HOW TO MARKET TO UPGRADERS

- Its all about the kids. The happiness of their children is paramount to most parents. Focus in on this emotion.
- Mixed Media. They consume media in various forms so in order to be seen we'll need to be present on multiple platforms.
- Efficiency. Upgraders are busy people. They don't have a lot of time so we'll make sure we use their time efficiently.
- Honesty/Transparency. Upgraders are protective of their families. They want to know exactly what the deal is. They appreciate honesty and transparency.



active duty & veterans

Eligibility requirements have changed.

We'll be the thought leader and expert when it comes to finding their homes.

We don't charge a percent of the finance. All others charge 1%.



referral partners

real estate agents

CPAs

financial advisors

divorce attorneys

3

brand mission

Transparent lending.

To make the home buying process as clear and as easy as possible by educating our target markets on best practices, becoming the ultimate thought leader in the mortgage industry.



clear mortgage is

Clear (duh)

Easy

Concise

Consistent

Efficient

Helpful

Fun and self-aware

Not afraid to say it (when 'it' is appropriate)

Educational

Local

Authentic

Inspirational

Experts, but never speaks in jargon*

Optimistic

Competitive

Interesting, all the time



4

channel strategies & content examples



what are we posting?

Mortgage tip videos (lots of them), classes, webinars, infographics, social posts, vlog posts, and emails.

core content topics

Mortgage tips for first-time home buyers, young professionals, upgraders, and veterans. We will also focus on content that improves realtors businesses and other people/companies in the mortgage industry.



publication channels

Vlog (website), Facebook, Instagram, YouTube, and possibly LinkedIn & TikTok



channel strategy: facebook

Facebook will serve as the main hub for our promotional and social media marketing efforts. It will also be used to create brand affinity and run advertisements for inbound sales strategies and will serve as a community hub for increasing the number of engaged followers for Clear Mortgage.

Business Goals: Improve brand recognition

Channel Goals: Build a community of engaged fol-

KPI's: Reach, impressions, likes

Content: Content will be a mix of industry news and original content, with updates shared 3-4x per week.

Content will consist of:

- Visual graphics
- Educational content
- Curated content
- Videos

Algorithm: It's important to consider that Facebook is FREE. Their organic algorithm is extremely poor. Without advertising, it's hard to reach a large number of people. This is organic only with the additional suggestion of specific inbound advertising methods that would require Facebook ads.



channel strategy: instagram

Instagram will serve as the secondary hub for our promotional and social media marketing efforts. It will be a place to engage in a two way conversation with our audience. The goal is to increase the following, build a community, and convert followers into future customers.

Business Goals: Improve brand recognition

Channel Goals: Drive traffic to the website, engage followers with free opt-in's, educate audience on company's core values

KPI's: Followers, mentions, comments, likes, shares, views, analytics, and feedback

Content: Content will be distributed on Instagram 2-3x per week.

Content will be a mix of:

- Visual graphics
- Videos
- Motivational short-form content



channel strategy: youtube

YouTube is where we will build Clear's business to business relationships and revenue. Focusing mainly on how we can help realtors and other mortgage companies, we will become the industry expert on growing a successful mortgage and real estate business, with professional quality videos. We'll have them saying, I want my branding and marketing to look like Clear's.

Business Goals: Improve B2B brand recognition and awareness

Channel Goals: Drive traffic to the website, engage followers with free opt-in's, educate audience on company's core values

KPI's: Subscribers, views, comments, likes, analytics, and YouTube ad revenue (eventually)

Content: Content will be distributed on YouTube 1x per week.

We will need to come up with different playlists.



channel strategy: linkedin

LinkedIn will serve as the tertiary hub for our promotional and social media marketing efforts.

Business Goals: Gain recognition and get some mortgages.

Channel Goals: We want to show everyone how fun it is to work at Clear. We'll primarily use it as a recruiting tool. And employees will gain acknowledgement and credibility working for Clear.

KPI's: Likes and Shares

Content: Content will be distributed on LinkedIn 2-3x per week.

Content will be a mix of:

- Visual graphics
- Videos
- Motivational short-form content

brand content (types)

Content Series #1 - Real People, Clear Stories

Content Series #2 - Clear tries TikTok.

Content Series #3 - Mortgage Mondays

Content Series #4 - If _____, then your mortgage isn't clear.

Content Series #5 - Whats-a-Mortgage? Ask kids what they think a mortgage is

How-to's Mortgage

Content Curation

Case Studies

Charts/Graphs

Ebooks

Email Newsletters/Autoresponders

Cartoons/Illustrations

FAQs

"Day in the Life of" Post

Infographics

Interviews

Life Hacks

Vlog

Videos

Surveys

Resources We Like

Quotes (minimal)

Quizzes/Surveys/Polls

Podcasts We Like

Press Releases

Company News

Industry News

New Employee Post

Loan Process Timeline

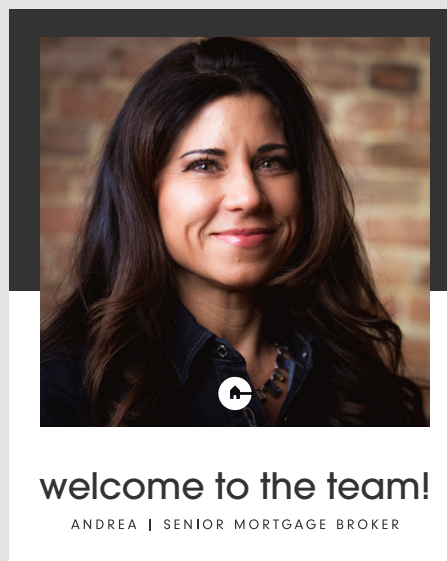
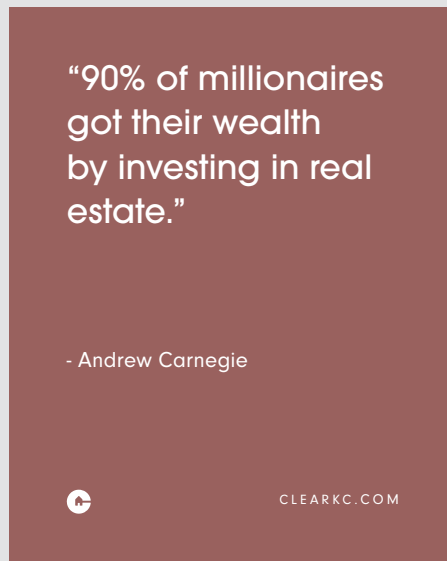
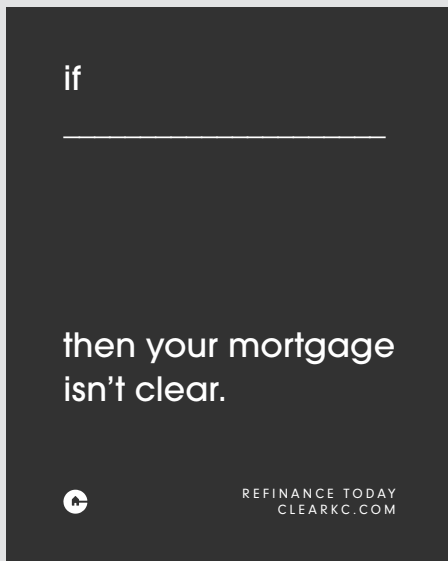


content styles

The main style will be photo heavy, with some illustrations for bigger holidays.

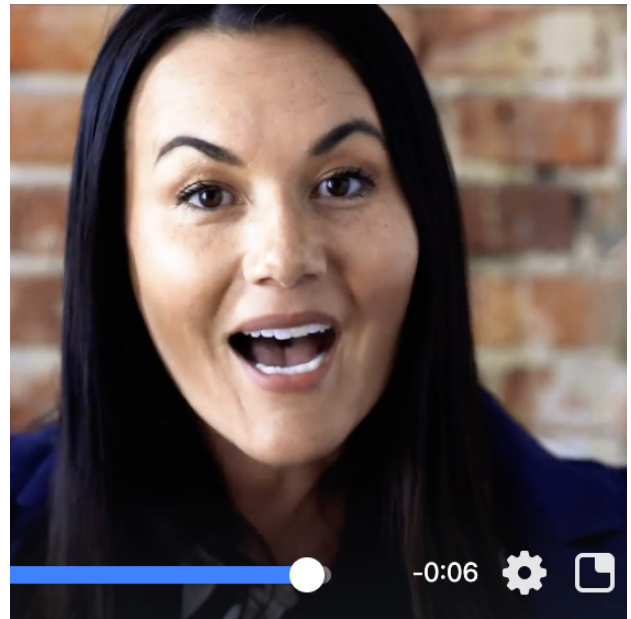
4x5 is the main ratio for all posts. black will be the main color, followed by a touch of rose gold and the royal blue.

4x5



content styles

Mortgage monday, how to video posts, and about the team videos.



Bigger video series like Clear tries TikTok and all videos on YouTube.





real people, clear stories.

We take real clients and tell their real stories (with their permission of course). We take a portrait of them and tell their story similar to Humans of New York but less depressing. Incentives for doing this for us are free headshots and \$50 VISA gift cards or one piece of free canvas art of their choosing.

clear tries TikTok

Reality TV style, short web series. Ryan films Office style and we create a funny Office style intro and use real stories with real employees trying to figure out how to use this new thing called TikTok. Sean will play the eccentric "Marketing Guy" and everyone else will play themselves. Sean to write each episode. But we can have a series of Clear tries different things or funny Office style dramas.



whatsamortgage?

Video series where we ask kids one question...

"What is a mortgage?"



#MortgageMondays

For this series we will have a new each week topic like:

- How to Lose A Mortgage in 10 Ways
- Pros and Cons of Refinancing
- 5 Things Veterans Should Know when Buying a Home

Adriana will explain each on a quick talking head video. We will create motion graphics and find other b-role to create an engaging, fun and professional feel to these videos. Each will be aimed at our three target demographics.



videos for secondary target markets

Topics relate to realtors and how to improve their business.

Adriana will explain each on a quick talking head video. We will create motion graphics and find other b-role to create an engaging, fun and professional feel to these videos. Each will be aimed at our secondary target markets like realtors, CPAs, and other Mortgage Lenders..

the end...

or

as some say,
the beginning.

