

THE  
**MORTGAGE**  
MARKETING  
**FORUM**

# **11 steps for campaign excellence**

A quick guide for  
members of the Mortgage  
Marketing Forum



# Creating a marketing campaign is easy, right?

On the whole delivering a marketing campaign is easy to do. But delivering a marketing campaign that is highly effective that delivers strong measurable results is a totally different ball game.

We have seen many campaigns drift off course or worse still – fail. Why? Because there is often a misguided belief that a campaign is easy to deliver. It isn't.

People often refer to campaigns as being “good”, “excellent” or sometimes even “rubbish”. However, these are often based on subjective opinion. The reality is that a campaign is not about being good, it is about being highly effective; it's about delivering results.

So how do you go about making a campaign highly effective?



"CREATING A MARKETING PLAN IS EASY.  
CREATING A CAMPAIGN THAT IS HIGHLY  
EFFECTIVE IS A DIFFERENT BALL GAME"





# Step by step to campaign power

## What You Need...

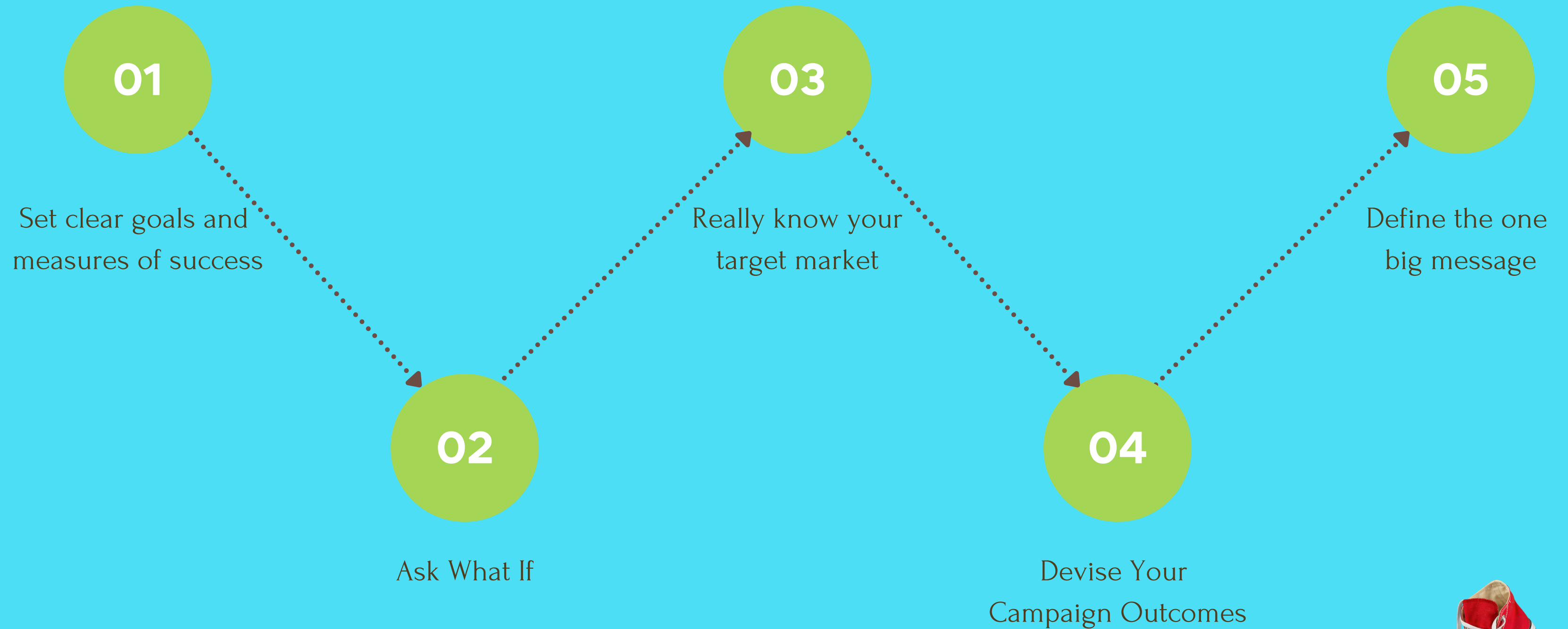
Delivering a highly effective campaign takes a bit of nous, a bit of time and a bit of resilience to avoid being pushed off the track when building it – usually due to compromises or shortcutting.

Overall a strong campaign needs thinking about, it needs insight to lead the way and creative thinking to drive the desired results.

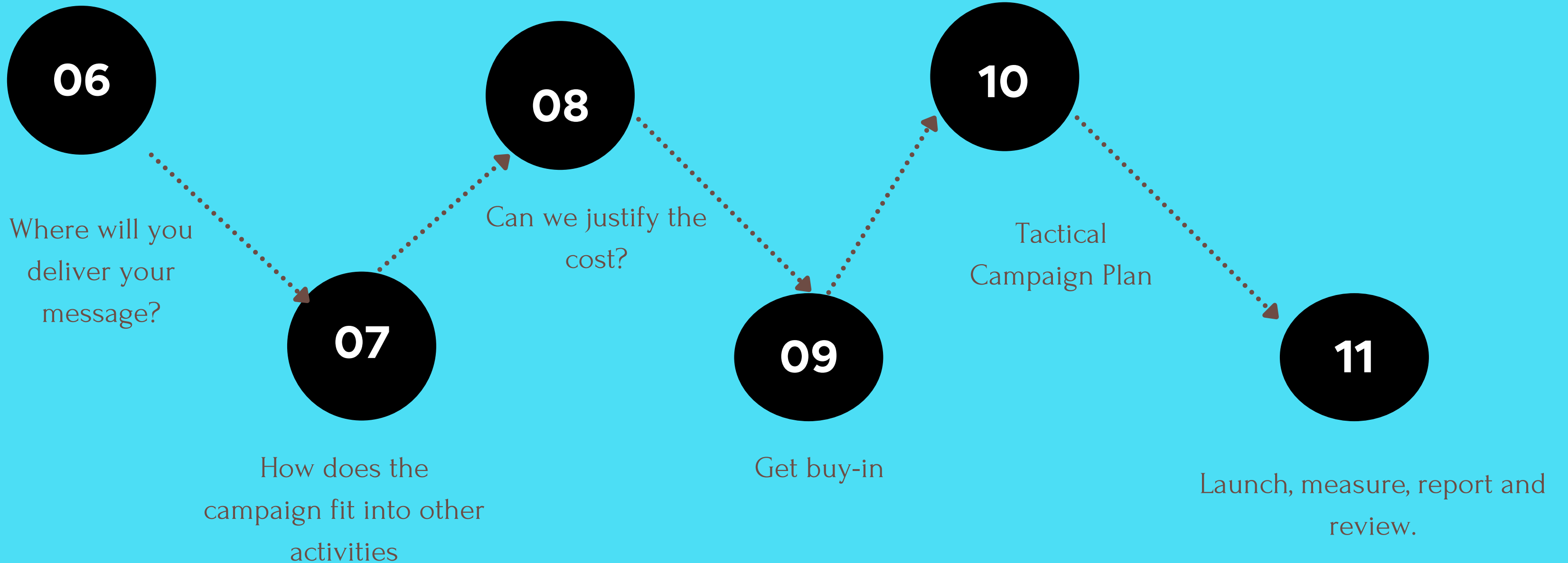
## Award winning...

The steps presented here can be adapted to your style of working but are what have been used to deliver award winning marketing campaigns - campaigns that deliver demonstrable results.

# Quick Overview Steps 1 to 5 for highly effective campaigns



# Quick Overview Steps 6 to 11



1

## STEP ONE

Set clear goals and  
measures of success

### WHY ARE YOU DOING THE CAMPAIGN?

You must be clear why you are doing  
the campaign.

### PROBLEM STATEMENT

What problem are you solving?

### START WITH THE END IN MIND

Determine the success measures, including  
lead and lag metrics.



2

**STEP TWO**  
**ASK WHAT IF**

Ask yourself what if we ran this campaign versus what if we didn't. If you didn't, is there something else you could spend your time on that may deliver better outcomes?

The more you think and plan upfront, the more effective your campaign.



3

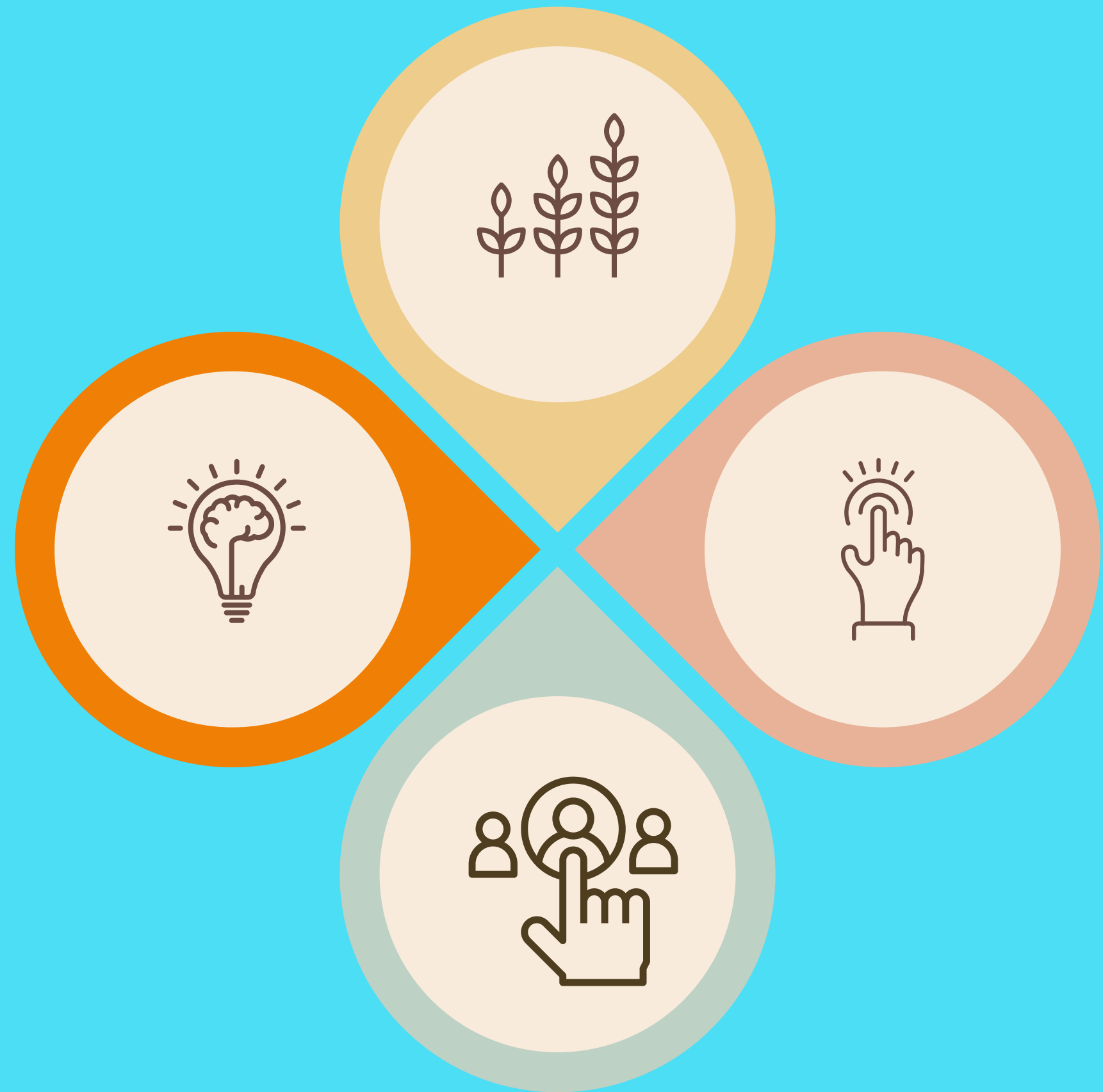
## STEP THREE REALLY KNOW YOUR AUDIENCE

Who are you targeting and where are they in the sales funnel?

What are their motivations and behaviours?

What competitors do they really use?

What do they currently think and feel about your brand?



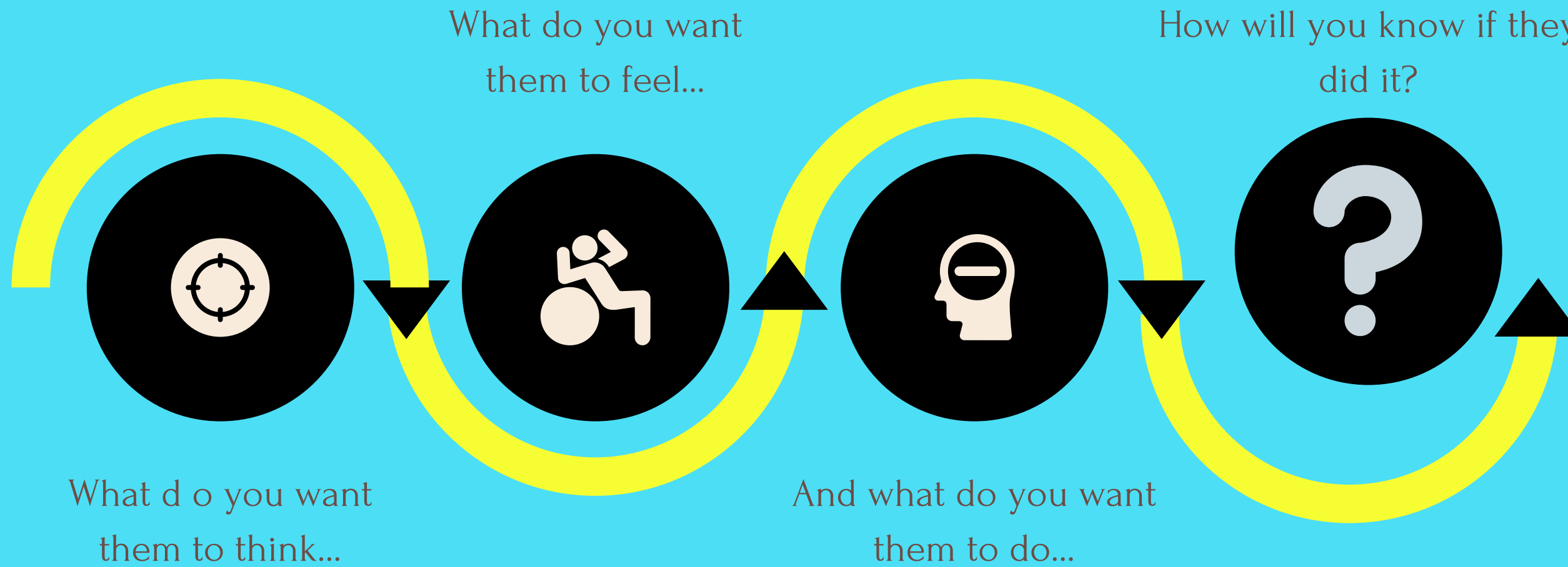


# 4

## STEP FOUR

### Your Campaign Outcomes

As a result of engaging with your campaign, think about the desired outcomes of your campaign



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## **Step Five - The One Big Message**

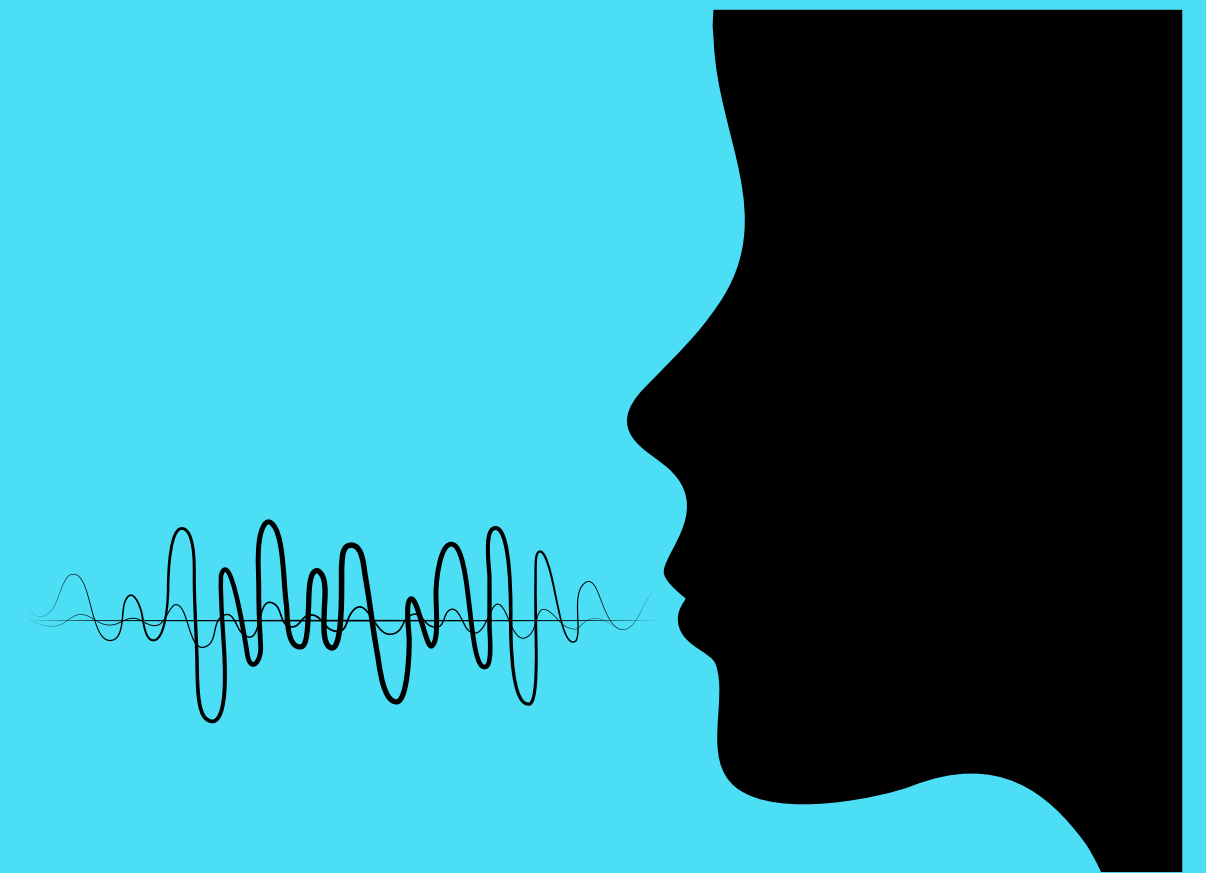
When delivering your campaign, you need just one big message.

You can deliver this message in different ways, but ultimately you need to say the same thing over and over.

Keep your message clear and be consistent in its use. It also must have an emotional connection. Ensure your audience don't just say "so what".

Make sure they can identify with whatever it is you are talking about.

Put yourself in the shoes of your target audience and think about what it in it for them. Then it becomes easier to deliver a message that makes a connection on an emotional level.

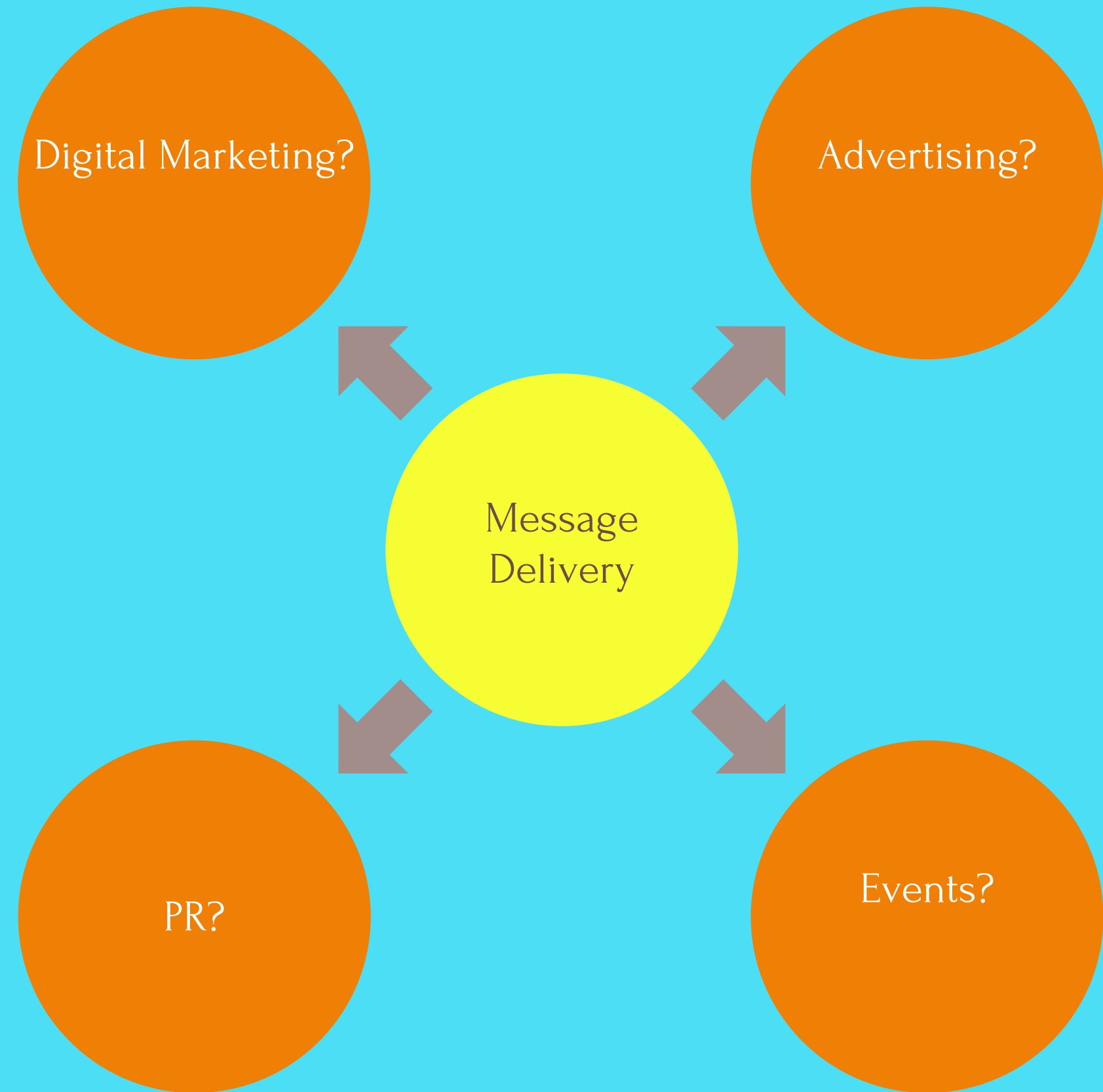




## STEP SIX

### WHERE WILL YOU DELIVER YOUR MESSAGE?

Now is the time to think about which communication channels you should use to deliver your message to reach your audience in the best way.



7

## **STEP SEVEN**

### **HOW DOES THIS FIT IN?**

Think about how this fits into the bigger picture. Does this campaign align with your overall marketing and business goals?

Think about how your campaign fits into other marketing activities and resources and budget requirements.

This is where good internal communication is important. If you work in a large organisation, just ensure your campaign does not meet head on with someone else's.



8

## STEP EIGHT

You now need to challenge yourself:

Can this be justified?

HOW MUCH WILL THE CAMPAIGN COST?

WHAT ARE THE OUTCOMES AND BENEFITS?

DO THE BENEFITS OUTWEIGH THE COSTS?

Could you spend the budget better in another way?



### **Think Win:Win**

Get buy-in early and think about what you want from your stakeholders and what you want them to think about the campaign. Put yourself in their shoes.



### **Seek input early**

Ask for input around what you want to achieve - and not what stakeholders think of the execution



### **Get agency input early**

Bring agencies into the loop early - before you hand them the brief. Make them feel part of the team.



## **STEP NINE GET BUY IN**



# STEP TEN

## your tactical plan



.....  
Now comes the nitty gritting. The tactical plan.

Think about when the campaign will start – and don't be over ambitious or over promise – and when it will end. Then fill in the gaps in between so everyone knows what is happening, when and by whom.



## **STEP ELEVEN**

measuring success



### **SHARE THE NEWS**

You will have your lead metrics in place, so review these regularly and make any campaign tweaks required.

### **CAMPAIGN END**

When the campaign ends, you will assess your lag metrics (which will be aligned to the campaign goals) to see how successful it was.

### **BE WISE**

See what worked well and learn from the next campaign



**Now go and create a highly effective marketing campaign**



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This guide has been created by Jeff Knight, on behalf  
of the Mortgage Marketing Forum.

This is for members of the Forum only and should not be shared with  
non-members.

