

# EMAIL MARKETING FOR **MORTGAGE BROKERS.**

**Why it pays to get personal**

For professional intermediaries only

## Email marketing, now back with a vengeance

**When social media took off back in the 2010s, it looked like it might spell the end for email marketing. And certainly the humble email was overshadowed by social media in marketing circles, at least for a while.**

Recently though, there's been something of renaissance in email marketing, as professionals have realised that it offers a degree of personalisation that's hard to replicate in other channels.

**A Data & Marketing Association survey** in 2021 found that the number of consumers who find email marketing useful had doubled from 15% to 32%. The same report revealed that consumers rank email ahead of all other marketing

channels for receiving brand messages about new products and services (53%), as well as for advice, information, and reviews (44%).

Email clearly offers some great opportunities for marketing, particularly in industries like financial services where personal relationships matter. And that has to be interesting for mortgage brokers.

**Within this guide we have provided links to various external sources of guidance. Please note, we are not responsible for the content or availability of any external linked sites.**

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## Email Marketing for Mortgage Brokers

Building relationships with clients is important for repeat business, and for the word-of-mouth recommendation that can mean so much to brokers. Email can play an important role in keeping those relationships going, contributing significantly to long-term business growth.

As for new business, email's been proven to drive traffic to websites, with recent HubSpot data showing **14% of website traffic comes from email marketing**. With figures like that, mortgage brokers can't afford to ignore email as a marketing channel.

A man with a beard and orange sweater is sitting in a van, working on a laptop. A large text overlay reads "14% OF TRAFFIC comes from email marketing".

**14%**  
**OF TRAFFIC**  
comes from email marketing

## What it's good for

As with any marketing activity, it's essential to define your goals before you start firing into your latest email campaign. And as a communication channel, it has particular strengths in certain defined areas. Here are a few stand-out candidates for the email treatment:



### **Promoting new services to existing clients.**

You've got the mailing list, so use it whenever you have a new or improved service to offer. It's among the best ways to ensure your clients know what's available.



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### **Checking in when clients need to remortgage.**

You should know when your BTL and residential clients' fixed-rate deals are coming to an end, so email them in good time to arrange a replacement.



### **Supporting & building existing relationships.**

Regular communication over the longer term can remind your clients you're still around - and still able to provide a valuable service when they need it.

Once you've established a tangible goal, it should be easy to measure the success of your campaign. Did you see an increase in website traffic or phone calls? How about conversions, and open rate? Data like that will tell you what works well, and what needs some refinement for the next campaign.

Stay the right side of

# GDPR

## Don't forget GDPR

**Data protection rules - governed largely by the General Data Protection Regulation or GDPR - are enough to strike fear into the heart of your average digital marketer. And although it's an EU framework, the GDPR has been adopted in post-Brexit Britain with minimal change.**

It doesn't have to be scary, though. Basically, GDPR says you have to ask for consent before sending marketing emails. And while you need your recipients to actively opt in, you also have to make it easy for them to opt out.

To stay the right side of GDPR compliance, just remember these important points:

- 1. Give clients a clear opt-in or -out option during the onboarding or sign-up process.**
- 2. Create an unsubscribe button and make sure it's clearly visible on every email.**
- 3. Update your privacy policies to clarify how personal data will be used for marketing and include this on your site.**
- 4. Adapt processes to ensure people can be removed from your database if they wish. Everyone has the right to be removed from company databases, at any time, and they don't need to give you a reason for their request.**

## Popular Email Marketing Platforms

Email marketing doesn't have to be difficult, but there's a lot to think about. So it can be helpful to buy into an existing platform that does much of the work for you - particularly if you don't have a dedicated marketing team.

Fortunately, there are plenty of solutions out there. **Here are a few of the leading options:**



### Mailchimp:

A user-friendly, low-cost email marketing platform, ideal for beginners. With a personalised onboarding service, you can be up and running in no time.



**Pros:** A user-friendly interface, an extensive template library, and a free membership plan.

**Cons:** Limited advanced features and scalability, and the free plan has a limited offering.



### Dotdigital:

This easy-to-use platform is great for both pre-build and customisable emails. Its intuitive email builder creates unique and engaging emails, as well as providing reporting and analytic data.



**Pros:** Multichannel marketing, advanced audience segmentation, and email automation.

**Cons:** Can be complex for beginners, and it's relatively expensive.

ActiveCampaign >

### ActiveCampaign:

Another easy-to-use platform, ActiveCampaign will drive customer engagement, generate new leads, and provide distilled customer data.



**Pros:** Automation and tagging, plus contact segmentation.

**Cons:** Reports can seem over-simplistic, consistent email formatting can be difficult, and there's a lack of integration..



### ConvertKit:

A simple platform that prioritises creativity and deliverability. Its email designer lets you focus on what matters.



**Pros:** An easy-to-use tagging system for managing and targeting users, with good deliverability. Affordable pricing, and a free trial.

**Cons:** Limited templates, analytics and integration.

**Each of these platforms has its own advantages and disadvantages.** You'll need to make a decision based on the size of your business, your ambitions, and your level of experience. Of course, you can always start with one and move onto a more sophisticated platform at a later date.

# ONCE ENQUIRIES COME THROUGH, SPEAK TO US

**Email marketing is a powerful tool for building relationships, conveying messages and attracting new clients. Use it wisely, and you could see a marked and valuable return on your investment, both in terms of time and money.**

Of course, when the new clients start rolling in and the old clients come back with repeat business, you'll might see a few complex cases. And that's when we'll be ready to help you help them, with some flexible, responsive Real Life Lending. Because TML are always **here for support.**



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