

Marketing Month 2025

Week 1 - Back to Basics



Paradigm

Getting Started

Welcome to Marketing Month 2025!

Get ready to supercharge your marketing this summer! Over the course of August, we're diving headfirst into all things marketing, giving you and your business the boost it deserves. Our mission? To help you connect better with your customers, nail your communications, snag those new leads, and make your brand shine!



Now, "back to basics" doesn't mean we're starting from zero. Maybe your strategy just needs a little tune-up to match your goals, or maybe you're looking to polish some rough spots. We get it – everyone's at a different stage in their marketing journey. While we can't give you personalised advice for every single situation, if you're reading this, you're probably thinking, "Am I doing this right? What could I do better?" We'll cover the core principles and give you simple tools to figure out exactly that.

So, here's your first brain teaser: Where do you see your business in one year? Five years? How can marketing help you get there? Does it all fit with your current plan? It's tempting to jump on the latest trend (like, "Everyone's on LinkedIn, I should be too!"), but hold on a sec! Think about what you want to achieve and if you've laid the groundwork.

We'll help you figure it all out!

Why Marketing?

Ever wondered, "What actually is marketing?" It's basically how any business gets the word out. Think about your own favourite things– how did you first find out about it? A quick Google search? Advertising at a bus stop A cool ad on TikTok? That's marketing in action!

Now, marketing can feel like a wild ride. There's always some shiny new app, strategy, or trend popping up, which can make diving in a bit scary. So, here's our first nugget of wisdom: don't sweat it if something flops! It happens to everyone, but what's important is understanding why it didn't work, and changing or enhancing it for next time...

Marketing is all about connecting the perfect message with the perfect person at the perfect moment on the perfect platform. Sounds easy enough, right? Well, buckle up, because there's actually a lot of behind-the-scenes magic involved.



MARKETING

The paid, owned and earned marketing activities are where a customer will interact with you and your business. When a customer has some kind of interaction with your business (paid, earned or owned), this is known as a "touchpoint".

It's worth noting that you won't always be aware that a touchpoint has even happened, such as word-of-mouth recommendations. Remember when we said it's all about putting the right message out at the right time to the right people?

Customer Journey

Let's be real, the old AIDA model and sales funnel just doesn't cut it anymore, especially when we're talking about big financial decisions such as mortgages, protection or insurance. Buying a house or sorting out your family's future is a rollercoaster of emotions, and it's definitely not a straight line. We've put together a sample Customer Journey Map to show you what that experience actually looks like for your customers.



This customer journey mapping thing is all about getting a clear picture of what your customers actually go through when they interact with your business. Once we've mapped it out, we can find the weak spots and figure out where to focus our efforts. Plus, understanding their thoughts and feelings is essential for Consumer Duty and making sure they have the right information at the right moments.

Let's walk through it: How did your customer figure out that they had a problem or a financial need? How did they discover you? What made them curious about what you offer? What pushes them to actually use your services? Remember that bit about the right message, right person, right time? This helps us nail that down. First things first, let's define your ideal customer. We've included a blank map for you to create your own within our Week 1 Documents. Have a go!

Finding your customer

You've likely got a good idea of who you're targeting, but let's put together a complete customer profile. It'll be super useful when you need to connect with specific groups and work out the best way to reach them.

Knowing your ideal client is just as important as knowing what's going on in the mortgage market. You're not just selling mortgage or protection products; you're helping people achieve their dreams – from that first home to a whole property portfolio. So, how do you find these dreamers?

It's all about finding your niche. A first-time buyer needs totally different advice than a buy-to-let landlord. Do you love helping young professionals navigate their first mortgage? Are you a buy-to-let guru, guiding landlords through the process?

Don't forget happy clients! They're your best cheerleaders. Ask them to write testimonials for you or offer referral bonuses to get them talking. Word of mouth is gold. Happy clients tell their friends, and that's the best kind of advertising. Make sure you're delivering a great service, and those referrals will follow. Lastly, make sure your website is Search Engine Optimisation (SEO) friendly. Use keywords like "landlords" and "property portfolios" so people can find you, and make sure your website is easy to use and packed with useful info. Know your customer, tailor your marketing, and you'll be connecting with the right people in no time!

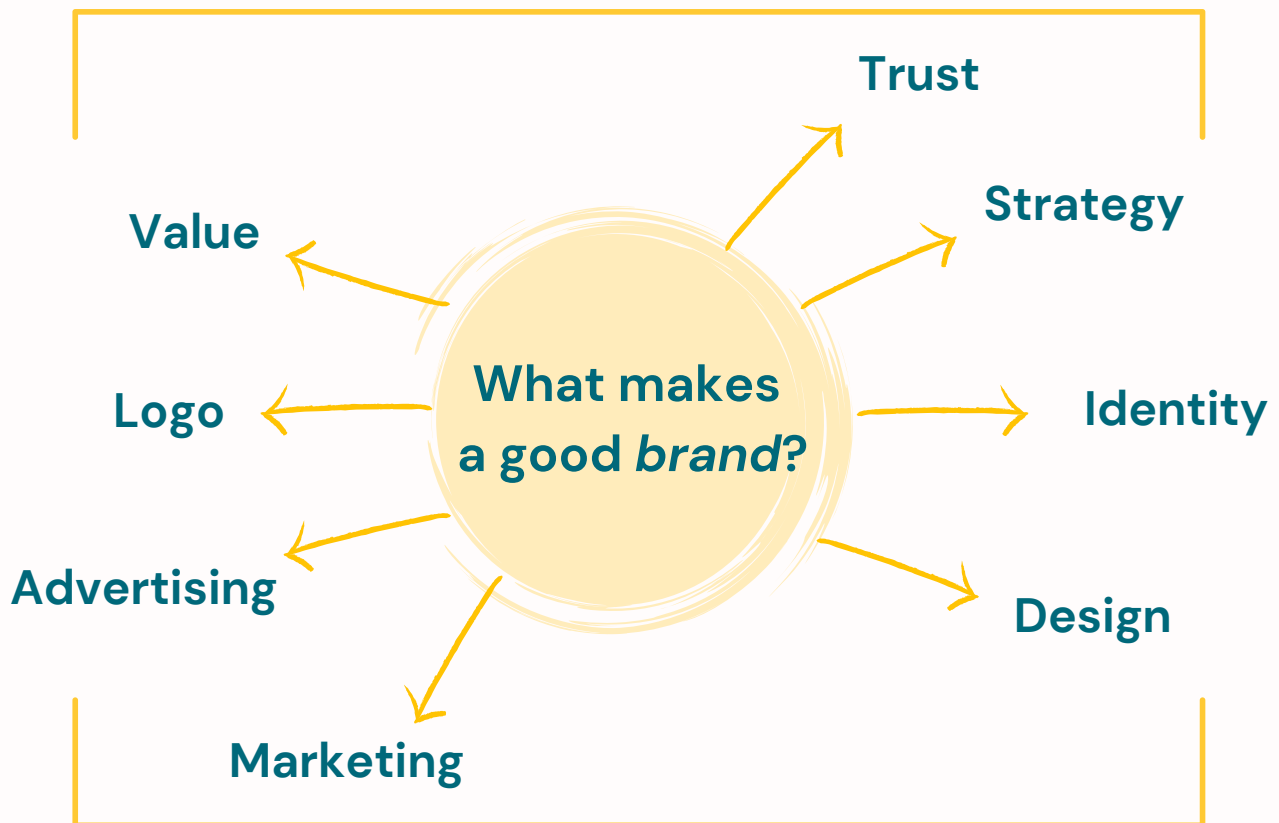
Keep an eye out over the coming weeks, as we touch on social media and your website to help.



Building a brand

Before you can become a great adviser, you must first build up customer trust, and that starts with your brand. Think of your brand as your reputation – it's what people say about you when you're not in the room. Do they see you as the friendly expert, the one who makes mortgages less scary? That's the power of a good brand.

Below you'll see many of the different aspects that make a good brand; this can be simple, like a logo, or things like tone of voice and your messaging across channels.



Once you know your audience, speak their language. No jargon, just straight talk. Share helpful tips on social media, create blog posts that answer common questions, and be genuinely helpful. Don't be afraid to show some personality – people connect with people, not just businesses.

Building a brand takes time, but it's the foundation of a successful business. It's how you become more than just a mortgage advisor – you become the mortgage advisor people trust.

Marketing Strategy

Alright, let's ditch the formal stuff and chat marketing like we're grabbing coffee.

So, here's the deal: marketing strategy and planning? They go side by side. You can't have one without the other. You figure out your big picture strategy, then you map out exactly how you're going to make it happen. And to do either, you have to know your own stuff and what's happening out there. You need to get familiar with your brand and your customers, then figure out how to make them click.

To get the ball rolling, here's a breakdown of how to put together your marketing strategy and plan. Keep in mind that everyone does things a little differently, but this is a starting point:

What's the big dream?

- First off, what's your overall business goal? Make sure your marketing goals line up with that. For example, if you want to increase your business, maybe your marketing goal is to get more people to your website and engage with your content.
- Or, you could start with a mission statement. Think of it as your "why." What are you trying to do, and how are you going to do it? It's less about numbers and more about you, but it'll help you figure out what to say in your marketing.

Dig into the market

- Before you start planning, you need to know what's going on. Do some marketing investigation work. Check out your company's strengths and weaknesses and what's happening in the market. Ask for feedback about what you do best, and what you could improve upon.
- Look for trends – what's hot right now? How can you jump on that? And what are the bumps in the road? What issues might pop up?

Get to know your people

- Your customers are the VIPs. You have to know what they want and how to give it to them better than anyone else.
- Figure out who your target audience is and what makes them tick. Whether you're brand new or have been around the block, this is key.
- The more you know about who you're talking to, the better you can tailor your marketing.

Marketing Strategy

Set some mini-goals

- You've got your big goal; now break it down. What smaller things do you need to do to get there?
- Think things like:
 - Getting new customers
 - Selling more
 - Getting your name out there
 - Building your email list (GDPR compliant of course!)
- Put numbers on those goals. Like, "get 2,000 new email subscribers by the end of the year." Make sure they're SMART: Specific, Measurable, Achievable, Relevant, and Timely.



Pick your tools

- Now, how are you going to hit those mini-goals? What marketing tricks are you going to use?
- If you want to build your email list, maybe you'll try posting more on social media or adding sign-up forms to your website. Track what works!

Investing in marketing

- Of course, time is money too. Marketing also requires an investment of time, and ideally, this needs to be regular and consistent. Try to carve out time to focus on these activities and do them properly.
- Make sure you know how much things cost, and think about your potential return on investment – will it be worthwhile?

It's all about teamwork

- If you have a team, then use them! They will have some great input to what you are creating, and sometimes you just need those fresh pair of eyes.

Basically, it's all about figuring out where you want to go and then making a plan to get there. Keep it real, keep it flexible, and you'll be golden.

... week 1 over and out

We've reached the end of our first Marketing Month session!

As FCA-regulated firms, you know how crucial it is to keep customer communications and financial promotions clear and compliant. That's where we come in. Paradigm helps you highlight your services and attract clients, all while staying within regulatory guidelines.

Our experienced Technical Helpdesk, established in 2007, can streamline your financial promotion processes and help you create impactful, compliant materials for your target audience. We routinely review:

- Your Websites
- Marketing brochures and flyers
- Business stationery
- Blog content
- Social media posts

Ready to learn more? Call us at **03300 536061** or request a **callback**.

We're eager to hear your feedback and answer any questions about our Marketing Month content. Let us know what you think!

Best regards,

The Paradigm Marketing Team





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