



# 2025 MARKETING

PLAN & STRATEGY

Provided by:

**Kind Lending** | **KindTPO.com**

# Marketing Plan Template

You can edit your version in one of two ways:

1. Edit this version to fit your needs
2. Go to “File” > “Download As” > “Microsoft Word” to Download

## How to Use This Template

This template should be used as a jumping-off point for your marketing plan. It includes customizable sections for:

- Business Summary
- Business Initiatives
- Target Market
- Market Strategy
- Budget
- Marketing Channels
- Marketing Technology

Remember, you should add/edit/delete any copy or sections as you see fit. We've also included an example of what this template might look like once it's finished below the template itself.



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# YOUR MARKETING EDGE

Kind Lending | Kind

## Edge Home Finance

### Loan Officer Marketing Plan

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#### Loan Officer Objective

This statement should reflect your overall strategy outlined in the pages that follow.

#### Authors of Document

[Name #1]  
[Email Address #1]

[Name #2]  
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# SWOT Analysis

As an Edge Home Finance Originator, I want to help my personal brand lean into what it does well, improve what it doesn't capitalize on what it can do, and defend against what could challenge it. With that in mind, here is my SWOT analysis for 2025

Strengths	Weaknesses
<p>What I'm good at.</p> <p>What's working?</p> <p>What my customers like about me.</p> <p>[Enter strengths here]</p>	<p>What I want to fix.</p> <p>What I want to strengthen.</p> <p>What I want to become more efficient at.</p> <p>[Enter weaknesses here]</p>
Opportunities	Threats
<p>What the industry might soon want.</p> <p>What I think I'll be good at.</p> <p>What will be my differentiator?</p> <p>[Enter opportunities here]</p>	<p>What I think could hinder my growth.</p> <p>What/who I think could take my customers in my local marketplace and target markets?</p> <p>[Enter threats here]</p>

# Marketing Initiatives

I have an ambitious S.M.A.R.T goal of... (Specific, Measurable, Attainable, Relatable, Timely)...

## Initiative 1

<b>Description</b>	[Example: Over the next 12 months, I will work on writing a monthly newsletter with a matching social video content campaign that becomes a go-to resource for my Real estate partners and answer their burning questions – and grow the number of referral leads month over month.]
<b>Goal of initiative</b>	[Example: To increase traffic to my loan officer website, creating critical top-of-the-funnel marketing content that helps me obtain more leads, and convert more leads to app.]
<b>Metrics to measure success</b>	[Website traffic, social analytics, new leads, apps, fundings]

## Initiative 2

Description	Enter copy here:
Goal of initiative	Enter copy here:
Metrics to measure success	Enter copy here:

## Initiative 3

Description	Enter copy here:
Goal of initiative	Enter copy here:
Metrics to measure success	Enter copy here:



# Target Market

## Target Markets

In 2025, I am targeting the following geographical markets where I will promote my mortgage services to B2B referral sources and to potential homebuyers.

My City and  
Home State

Enter copy here:

Additional  
States I am  
licensed in.

Enter copy here:

## Homebuyer Personas

Within my target market(s), i've identified the following homebuyer personas to represent my ideal clients:

Buyer  
Persona 1

Enter copy here:

Buyer  
Persona 2

Enter copy here:



**Pro Tip:**

If you haven't developed or updated your homebuyer personas yet, please download the "Homebuyer Persona template" to make in-depth, visual representations of your customers.

## Competitive Analysis

Within my target market(s), I expect to compete with the following Loan Officers or companies:

### Company 1

<b>Products I compete with</b>	[This competitor's product/service, what it does, and what it might do better than yours]
<b>Other ways I compete</b>	[Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on]

### Company 2

<b>Products I compete with</b>	[This competitor's product/service, what it does, and what it might do better than yours]
<b>Other ways I compete</b>	[Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on]

## Company 3

Products I compete with	[This competitor's product/service, what it does, and what it might do better than yours]
Other ways I compete	[Example: This competitor has a blog that ranks highly on Google for many of the same keywords we would like to write content on]



### Pro Tip:

If you want to get even deeper in performing a Competitive Analysis, check out our template!

# Market Strategy

## Product

[Describe the products and programs with which you will enter the target market described in the section above. How will this product or program solve the challenges described in your buyer persona description(s)? What makes this product different from (or at least competitive against) your competition?]

## Price & Experience

[Are you pricing the products and programs and also taking into account experience and commitment from your lender to close your deals quickly and efficiently?]

## Promotion

[How will you promote this product or program? Think more deeply than your blog or social media channels. What about this content will drive value into your product?]

## People

[Who will play a role in your market strategy? Describe what each of them, or each team, will do to bring your market strategy success.]

## **Process**

[How will the product or program be delivered and messaged to your customer?

## **Physical Evidence**

[Where is your product displayed? As a mortgage is technically an intangible product, how would customers produce visible evidence of your business, examples would be testimonials, reviews, closing photos, etc?]

# Budget

Over the course of 2025, I expect to invest in the following items to ensure we meet the objectives outlined in this marketing plan: (remember investment doesn't always refer to monetary but also investment of time)

Marketing Expense	Estimated Price or Time
[Expense Name]	
[Expense Name]	
[Expense Name]	
[Expense Name]	
[Expense Name]	
[To add more rows to this table, right-click a cell, then select Insert > Rows Above / Rows Below]	
<b>Total</b>	<b>[Total Expense for Current Year]</b>

# Marketing Channels

Over the course of 2025, I will launch/ramp up the use of my following media channels for educating our customers, generating leads, and developing brand awareness:

## My MLO website

Purpose of channel

[Example: Brand Awareness]

Metrics to measure success

[Example: 10,000 unique page views per month]

## [Social Network 1]

Purpose of channel

[Example: Brand Awareness]

Metrics to measure success

[Example: 50,000 unique page views per month]



## [Social Network 2]

Purpose of channel

[Example: Brand Awareness]

Metrics to measure success

[Example: 50,000 unique page views per month]

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# Marketing Technology

I will utilize the following technologies and software to help me achieve my goals and objectives.

## Marketing CRM

[I log in and will use my CRM. Briefly explain how you will be committed to the CRM.]

## Email Marketing

[Share how you will commit to daily emails, weekly newsletters, and campaigns. ]

## Community Engagement

[Share how you will commit to community engagement to build both your b2b referral base and get in front of more homebuyers]

## Social Media Marketing

[Share how you will commit to growing your social media channel(s).]

## Video Marketing

[Share how you will use consistent video creation to build your personal brand.]

