

A hand holding a smartphone is shown in the upper right portion of the image, slightly out of focus. The background is a warm, orange-toned bokeh. A large, dark blue geometric shape, consisting of several overlapping triangles, covers the bottom half of the image, serving as a background for the text.

**ZILLOW<sup>®</sup>GROUP**

**Tips for Building Successful  
Mortgage Email Campaigns**

The most important thing to remember when drafting mortgage email campaigns is that people are often looking through their inbox to delete emails, not read them, so you've got to make a positive first impression when reaching out to contacts — and maintain that rapport throughout the duration of your email campaign. There are three pieces to any email campaign, and they're all equally important to contributing to the overall success – email format, content strategy, and scheduling.

## Mortgage email campaign format

### Subject line

Typically, it's a best practice to make your subject line a title rather than a sales pitch. Today's consumers are flooded with sales messaging; you don't want your emails to fall into the category of advertising wallpaper, so let your audience decide for themselves how your content can benefit them. For instance, if you're running a campaign to inform borrowers about current interest rates, consider using a subject line like "Today's Rates" instead of "Our rates are here to save you money."

### Email body

When drafting the main content of your email, use short, concise sentences, make it personal and conversational, and jump straight into how your business can benefit the reader. People are more likely to read through an email they can skim and easily digest, and personalization creates a sense of connection which reminds readers that the email is from a real person.

Make use of bulleted lists and white space. Instead of creating a long paragraph that explains the benefits of working with you, include those benefits in a 3-4 item bulleted list. Often, a bulleted list will be the first thing that catches the reader's attention. Also, if you include mortgage rates in your email, consider using a table format to better direct the reader's attention to the important content.

### Call to action

Take advantage of email conventions. For instance, people expect the call to action (CTA) to appear at the bottom of the email in the form of a button. You don't have to reinvent the wheel to make a great CTA. When you're using a button, include a plain text hyperlink below the button if for some reason their email client doesn't display the button image or HTML code correctly.

## Content strategy

### First email

Your first email communication is your best opportunity to win the client. The goal isn't to introduce them to a drip marketing campaign; it's to close their business. When the potential borrower gave you their contact information, they expected you to contact them. The first email should be brief and to the point: one short paragraph, a bulleted list and a CTA.

## Second email

So, they didn't bite on your first email? No problem. They might have been distracted with other things or read your email on the go and forgot to follow up. Your second email should reference your initial sales pitch in a softer manner, and also include a value-add piece of information such as a mortgage FAQ, just in case the borrower is interested in doing business with you but isn't ready to buy in the immediate future.

## Third and subsequent emails

Communicating with a contact after the initial push can sometimes be the key to closing a loan. Continue providing relevant, valuable information that the prospective borrower will find helpful and keep your brand at the top of their mind. Email campaigns allow you to exert minimum effort toward a contact while still keeping the opportunity alive months or even years after the initial request.

## Scheduling

### Day and time

No two potential borrowers are the same. Between work habits and personal schedules, contacts are bound to be reading emails at many different times. Still, you should test and get an idea of your audience's habits over time and cater to their schedules. A/B test your messages to see if your contacts are more receptive in the morning, afternoon or evening. Are weekdays or weekends best? Use your CRM or Google Analytics to evaluate open and click-through rates and adjust your schedule accordingly.

### Cadence

Relevance of content is key when planning a drip campaign schedule. If you're running a simple prescheduled campaign based on static time intervals, start more aggressively and taper off into a monthly email.

*Sample schedule:*

- *Email #2: One week after initial email*
- *Email #3: One week after Email #2*
- *Email #4: Two weeks after Email #3*
- *Subsequent emails: One month after previous email*

On the other hand, if your content is based on market fluctuations, the cadence will be determined by dips or spikes in rates. Regardless of the campaign type, make sure you provide a good balance of informational and sales-oriented content throughout the campaign sequence. If you're too aggressive, they'll unsubscribe. If you're not aggressive enough, you'll lose them to a competitor, so keep the valuable content flowing to your contacts' inboxes.