



# **Cory A. Jones** **| Campaign Portfolio |**

*This document contains internal and external published campaign work that has been developed and produced in previous marketing and communications roles. It is shared for all intents and purposes of showcasing an ability to fulfill qualifications and requirements in related job positions.*

# Campaign Plans

# MeridianLink Mortgage

## Marcom Plan – OpenClose Integration

**Example of Campaign Plan  
for Acquisition Integration**

# Marketing Objectives

<b>Objectives</b>	<ul style="list-style-type: none"><li>▪ Build awareness of the MeridianLink Mortgage rebrand portfolio, including integration of OpenClose solutions; initiate sales growth from key target accounts (GTM segments 1 &amp; 2: Small-Medium Size Retail, CUs &amp; MLC Banks &amp; Small-Medium Size, Retail, IMBs)</li><li>▪ Build awareness of MeridianLink and the value of ML Mortgage to build new logo opportunities (All GTM Segments 1, 2, 3)</li></ul>
<b>2023 Goals and KPIs</b>	<ul style="list-style-type: none"><li>▪ Increase Point-of-Sale application demos/adoption by XX for all targets MLM/OC customer base</li><li>▪ Increase PriceMyLoan PPE demos/adoption by XX within OC customer base</li><li>▪ Determine Marketing KPIs based on sales pipeline #s – TBD (i.e., increase depository opportunities by XX)</li></ul>
<b>Core Campaign Message</b>	<ul style="list-style-type: none"><li>▪ ML Mortgage offers omnichannel mortgage solutions that improve efficiency while reducing costs and time to close. (<b>Brand Pillar: Efficiency</b>)</li><li>▪ Our comprehensive solutions and tools (Open API, PPE, Edocs, web portals) allow customization while maintaining strict regulatory compliance. (<b>Brand Pillar: Flexibility</b>)</li><li>▪ We provide direct value through ease of use and implementation with best-in-class support at every step. (<b>Brand Pillar: Reliability</b>)</li></ul>
<b>Campaign Themes</b>	<ul style="list-style-type: none"><li>▪ Scale Your Business by Automating Manual Processes (<b>Roadmap Pillar: Automation</b>)</li><li>▪ Delighting Depositories with the Industry’s Most Modern Mortgage Solutions (<b>Roadmap Pillar: Depository/Consumer X-sell</b>)</li><li>▪ Provide a Frictionless Borrower Experience with Integrated LOS and POS Platforms (<b>Roadmap Pillar: OpenClose Integration</b>)</li></ul>

# Campaign Components

## Target Personas

- C-level: Business Decision Maker
- VP Lending: Business Influencer
- IT - Admin: Technical Influencer
- Consumer Lending staff: Executive Sponsor/Business Influencer/User

## Addressed Buying Stages

- Awareness: The buyer is demonstrating the symptoms of a challenge and is aware of certain issues and pain points but isn't yet sure how to best address them.
- Solution: The buyer is aware of their challenge and actively looking for solutions.
- Selection: The buyer is ready to make a final purchase decision and become a customer.

## Channels

- Email
- Social Media: organic posts, sponsored posts
- Search: paid, retargeting
- Website
- Trade shows
- Industry Associations

## Content

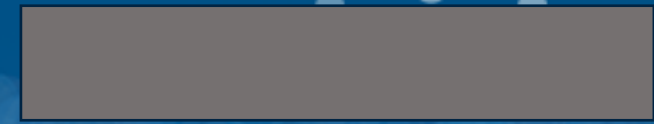
- Webinars
- eBooks
- Sell Sheets
- Blog posts
- Case Studies
- Testimonials
- Videos
- Podcasts



# Overview: Q1/Q2 2023

Item	Q1 2023	April	May	June
GTM Segment Development: Completed				
GTM Target List Development				
Messaging:				
Sales Training: Complete				
Initial Collateral Development – Enablement (Sell Sheets, Video (:30 – 3:00 sizzle), Sales Play?)				
Distribution				
Website Migration/HubSpot & SF Operations: Home page banner: 4/3/23 Mortgage product pillar page: 4/3/23				
Email: Message to Employees & ML opt-in list: 4/3/23 Outreach sequence from Sales: 4/3/23				
Press Release: 4/3/23				
Blog Posts				
Social Media, ABM and Google Display/Retargeting				
Webinars				
Association Partnerships				
Industry Conferences				

# Marketing Tactical Timeline: Phase 1



Item	Lead	Due	Status	Notes
<b>GTM Segment Development</b>				
Finalize GTM segments	DW			
Complete initial bookings waterfall draft by GTM segment	??			
Define buyer journey by GTM segment	CJ			
<b>Messaging</b>				
Document messaging strategy, including key messages/value prop per GTM segment & persona	CJ/RS	2/24/23		
Review/update ML Mortgage keywords to incorporate into DG and incorporate in web content	CJ/KM	3/3/23		
Website wireframe	CJ/RS/ KM	3/3/23		
Sales outreach cadence development	CJ/TN	3/10/23		
<b>GTM Target List Development</b>				
Export audience GTM segments from Salesforce	DW	3/10/23		
Append OpenClose contacts with SFDC/Hubspot	RW	2/27/23		Backend updates
<b>Sales Training/Enablement (Internal)</b>				
Sales Deck	CJ/TM	3/10/23		
OpenClose Demo for Sales	VF/RS	3/24/23		
Finalized Sales Playbook	CJ/TM	3/17/23		
Battlecards	TM/TN/CJ	3/24/23		

Item	Lead	Due	State	Notes
Content		Content complete date		
Website pillar page content	CJ/RS	3/10/23		
Pillar Page Live	KM	4/3/23		Spear?
Sales Deck/Graphics	CJ/CF	3/17/23		
Finalized Sales Deck/Graphics	CF/CJ	3/24/23		
Sell Sheet	DW?	?		
Sell Sheet complete	CF	3/24/23		
eBook/whitepaper draft		3/10/23		
ebook complete	CF	4/9/23		
Blog posts	CJ	4/6/23		Initial post live 4/3
Infographic	CJ	4/9/23		
Ad development for ABM strategy	CJ/KM	4/3/23		Spear?
Video	CF	4/3/23		
Case Studies	CJ/RS	4/3/23		Step 1: Rebrand existing? Step 2: New for POS
Press Release	BF	4/3/23 Go Live		Draft in progress – review with BF 3/14/23
<b>Distribution</b> Go live date				
Social Media	BF/KK	4/3/23		
Landing Pages	KM/BT	4/3/23		
Website Migration	Mktng	4/3/23		Karine
Press Release	BF	4/3/23		
Webinar #1	Mktng	TBD		Potential Apr/May - ACUMA
Webinar #2	Mktng	TBD		Pre-record for May/June?
Associations	CJ	April		TMC, ACUMA, MBA
<b>Other</b>				
HubSpot Operations	KM	3/31/23		

Updated 2/14/23

# Marketing Deliverables Summary: Mortgage

## March

- What's New webinar – inform clients
- **Tradeshow:** TMC, case study
- Content/Messaging
- Solution logos?
- Tradeshow Exhibit/Banners
- Video #1 - Sizzle
- Website Updates
- Datasheet – Overall + POS
- 1-2 OC POS case studies (if available)
- Press Release, TBD
- Sales Meeting – to inform status of rollout
- Backend updates, sunsetting site

## April

- **Tradeshow:** MBA Tech, demo, new names intro
- **Press Release:** TBD, LOS/POS new features
- **Sponsor Webinar:** TMC Rundown Interview (JP or Vince)
- **Sponsor Webinar:** ACUMA interview intro
- **Sponsor Podcast:** MBA Fintech w/ Michael Hammond
- Paid Ads
- HubSpot Operations
- Outreach Play
- Blog #1
- Video #2, overview

## May

- **ML User Forum** presentations/demo
- **Sponsor Webinar:** ACUMA
- **Sponsor Podcast:** MBA Fintech w/ Michael Hammond
- Blog #2
- Continued Outreach Play
- Continued ABM
- Paid Ads
- Outreach Play
- Video #3, demo POS

## June-July-August

- Start new case studies
- **Sponsor:** TMC Success Stories
- **Sponsor Podcast:** ACUMA
- Blog #3,4
- Continued Outreach Play
- Continued ABM
- Paid Ads
- Ebook or Whitepaper
- Continued Outreach Play
- Continued ABM
- SE CUREN
- Florida CUREN

## Sept-Oct

- **Tradeshow:** ACUMA Annual
- **Tradeshow:** MBA Annual
- **Sponsor Webinar:** MBA
- **Sponsor Podcast:** MBA Fintech w/ Michael Hammond
- **Tradeshow:** TMC
- **Sponsor Webinar:** TMC
- Blog #5
- Paid Ads
- Continued Outreach Play
- Continued ABM

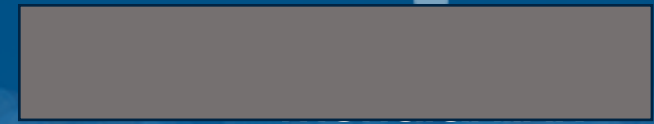


# MeridianLink Mortgage

## Campaign Plan

**Example of  
Quarterly Campaign Plan**

# 6-Month Plan Overview



Initiative	Activity	Audience	Goal	July	Aug	Sept	Oct	Nov	Dec
Thought Leadership	Blog content: -Automation -Retaining Top Talent in a Down Market -Attracting Millennial Homebuyers -Credit Union Partnership -Unified Platform, Diversified Lending -Home Equity	IMB / Broker Prospects CU Cross-sell Prospects	-Education / Awareness -Generate Leads	X	X	X	X	X	X
Automation	Infographic: Top Processes to Automate	IMB / Broker Prospects & CU Cross-sell Prospects	-Education / Awareness -Generate Leads	X	X				
Campaign: Digitalize the Lending Process	Blog/Social/Webinar/Paid Ads/Case Study: How to Leverage Your LOS to Create Value-Opportunities with Integrations	ML Mortgage Clients Prospects	-Education / Awareness / Buyer Decision / Trust -Generate Leads	X	X	X	X	X	X
Campaign: Assessing Your Tech Stack	Blog/Infographic/Paid Ads/Landing Page/Social/Client Video Testimonial	IMB / Broker / FI Prospects	-Education / Awareness -Generate Leads	X	X	X	X	X	X
Events	ACUMA Annual – September 18-21, Vegas (Keynote Speaker Sponsor, seat drop, webinar)	Credit Union Prospects / CU Cross-sell	-Meet 5 Prospects/Partners -Client relationships -Competitor Intel		X	X	X	X	
Events	TMC Summer – September 25-27, Chicago (Lanyard Sponsorship)	Clients, IMB + CU Prospects	-Meet 5 Prospects -Client relationships -Competitor Intel		X	X	X		
Events	MBA Annual – October 23-26, Nashville (Booth Sponsor, Pre-show event 10/23 Topgolf)	Clients, Banker Prospects	Meet 5 Prospects -Client relationships -Competitor Intel		X	X	X	X	
Sales Enablement	Testimonial/Reference/Case Studies: Consumer / Mortgage client (exploring Sharonview FCU), Wholesale clients (Newfi, MiMutual), Video (FlexPoint, Inlanta Mortgage), RPA (Mountain West, FlexPoint)	CU Cross-sell, IMB Prospects	- Highlight client using both platforms - Reference for Sales	X	X	X	X	X	X
Sales Enablement	Request for Information Document – update RPA Datasheet – create	Prospects	-Overview of LOS and offerings -Brand Review				X	X	X

# Key Tactical Deliverables & Content - Q3

## Month: July

- **Blog/Thought Leader:** Attracting Millennial Homebuyers
- **Blog/Thought Leader:** Tips to Retaining/Attracting Loan Officer Talent
- **Social:** 4x
- **CU Insight:** Byline
- **Infographic:** Top Processes to Automate (for IMBs)
- **Ad** creative
- **Infographic:** Evaluating Your Tech Stack
- **Webinar Marketing:** Marketplace
- **Datasheet:** API/Marketplace
- **Case Study:** FlexPoint
- **Lender Perspective:** Inlanta testimonial (blog and or video)
- **Sales Enablement:** RFI Doc
- **Lead /Demand Gen:** Landing Page, Google, Email Nurture, Paid Search
- **PR/Media**

## Month: August

- **Blog/Thought Leader:** Expanding Homeownership – Charting the Path Forward
- **Blog/Thought Leader:** Adapting Tech Solutions to Fit People & Processes
- **Social:** 4x
- **Infographic:** Top Processes to Automate (for CUs)
- **Ad** creative
- **Lender Perspective:** MiMutual testimonial (blog and/or video)
- **Case Study:** MiMutual
- **Lead/Demand Gen:** Landing Page, Google, Email Nurture, Paid Search
- **PR/Media**

## Month: September

- **Blog/Thought Leader:** CU/Fintech Partnership
- **Blog/Thought Leader:** CU Cross-sell audience topic TBD
- **Social:** 4x
- **Event Marketing:** ACUMA (CUs)
- **Event Marketing:** TMC (IMB/CU/Partner)
- **Ad** creative
- **Lead/Demand Gen:** Landing Page, Google, Email Nurture, Paid Search
- **PR/Media**

# Paid Ads & Events Timeline - Q3

Item	Target	Messaging	July	August	September
<b>AD:</b> Financial Brand - eDigest Advertorial– July 8, Aug 17, Sept 16	New Logo	Evaluating Tech Stack	8	17	16
<b>AD:</b> Financial Brand – Top Text Display Ad, September 1-30	New Logo	Evaluating Tech Stack			1-30
<b>AD:</b> Scotsman Guide – Digital ROS Display – July, August, Sept	New Logo	Digitalize Lending Process	1-31	1 - 31	1-30
<b>AD:</b> Scotsman Guide – Full Page Print – August, September	New Logo	Evaluating Tech Stack		1-31	1-30
<b>AD:</b> American Banker – Digital ROS Display – July, August, Sept	New Logo	Evaluating Tech Stack	1-31	1-31	1 - 30
<b>AD:</b> Rob Chrisman – Commentary Ad – July 29, August 12, 26, Sept 16	New Logo	Digitalize Lending Process	29	12, 26	16
<b>AD:</b> HousingWire – LendingLife Newsletter Leaderboard week	New Logo	Upcoming Webinar	18-22	8-12	12-16
<b>AD:</b> HousingWire – Digital Display, August	New Logo	Evaluating Tech Stack		1-31	
<b>AD:</b> National Mortgage News – Digital Display, Aug-Sept	New Logo	Evaluating Tech Stack		1-31	1-30
<b>AD:</b> MBA Newslink – Top Sidebar Banner, Aug 22-26, Sept 12-16	New Logo	Digitalize Lending Process		22-26	12-16
<b>AD:</b> National Mortgage News – Asset Promotion	New Logo	Evaluating Tech Stack		8	
<b>AD:</b> National Mortgage News – eNewsletter Graphic Display	New Logo	Digitalize Lending Process		22-26	5-9
<b>AD:</b> Callahan Sponsored Eblast – Sept 14	CU New Logo	ACUMA show, budgeting for 2023			14
<b>WEBINAR:</b> Digitalize More of the Lending Process with Partner Integrations (Marketplace presentation, Outreach, HS email invites, social, LP, blog, giveaway)	Client + New Logo	LOS with flexibility to customize using APIs	26		
<b>EVENT:</b> ACUMA Annual (Keynote Speaker sponsor, attending, meeting space, giveaway, Outreach, LP, blog recap, social, HS pre-show/post-show emails)	CU Cross-sell, NLogo	Tech Partnership			18-21
<b>EVENT:</b> TMC Summer (Lanyard Sponsor, meeting space, attending, giveaway, Outreach, LP, blog recap, social, Demo Showcase, pre-post email)	New Logo	Tech Partnership			25-27
<b>ONLINE:</b> Keyword search optimization/Google Ad Words	New Logo	LOS			