



Experienced Admin: Holiday Marketing Prep

Action Items

- **Publish Expert Content flyers, postcards, and social media graphics** for loan officers to leverage this holiday season.
 - Go to Manage **Marketing** → **Manage Templates** to see the new Expert Content in your library.
 - Examples in training include:
 - DM Postcard - Thanksgiving 0990
 - Social - Thanksgiving 1040, 1142
- **Release emails for direct sends to high-value customers.**
 - Go to **Email Marketing** → **Emails**.
 - Click the **Create Email** button at the top of the email library.
 - Search for the upcoming holiday.
 - Examples in training include:
 - Happy Thanksgiving Concept B
- **Publish a specific holiday pipeline view** that surfaces high-value contacts to whom your loan officers can provide a special white-glove direct email send.

Sending Holiday Marketing

- Emails
 - Campaign Builder
 - Set audience criteria based on which contacts you would like to target.
 - Set sender criteria based on which users you would like this to go out on behalf of.
 - Pipeline Views
 - For example: Target Client group or Borrower group
 - For example: Funded loans in the last year
- Postcards
 - Can be mailed through TE Professional Printing Services.
 - Loan officers can choose to have all postcards shipped to them (non-direct mail), or directly to a specific contact list (direct mail).
- Social Media Graphics
 - Deploy all social media graphics to your user base. Then have them schedule their posts the week of the upcoming holiday, so they will not need to take any action on that specific day.
 - Quickly and easily create your own social media graphics for the upcoming holiday using our self-serve templates or static media uploader.



Related Resources

- [*Expert Content Strategy Guide – Holiday Social Media Graphics*](#)
- [*Organization Level Pipeline Views*](#)
- [*Using the Campaign Builder*](#)
- [*Using Self-Serve Print Content*](#)
- [*Static Content Uploader*](#)