



# Strategic Plan

2024-2029



MORTGAGE  
PROFESSIONALS  
CANADA

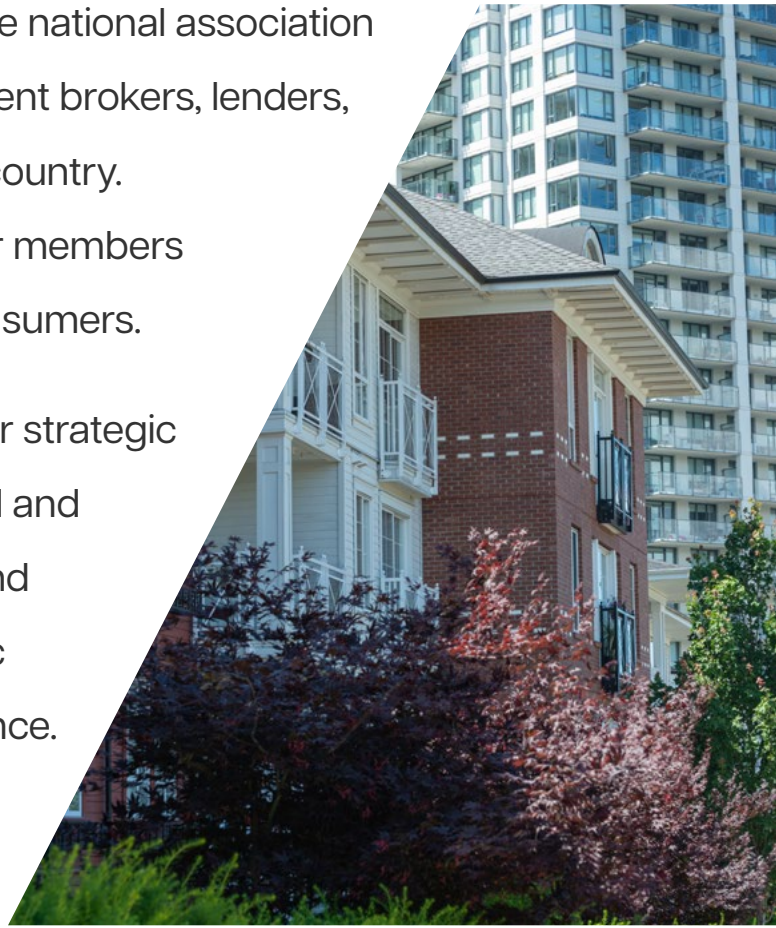
# EXECUTIVE SUMMARY

Mortgage Professionals Canada (MPC) is the national association for Canada's mortgage industry. We represent brokers, lenders, insurers, and service providers across the country.

As the industry's voice, we advocate for our members to governments, regulators, media, and consumers.

In 2024, our Board of Directors reviewed our strategic plan. Recognizing the post-pandemic world and industry changes, we've set a new vision and mission for the next five years. Our strategic pillars will guide our initiatives and governance.

We believe our priorities will be valuable for all industry stakeholders nationwide.



## VISION:

To be **THE** voice of the mortgage industry in Canada and strategically drive a strong future for the industry.



## MISSION:

Advance the mortgage industry by unifying, advising, and engaging all stakeholders as we support homeownership for Canadians.



# STRATEGIC PILLARS (2024-2029)

Below are the 5 key pillars that drive MPC as an organization. These pillars are closely aligned to the departments that operate the association. In the subsequent pages we outline the short, medium and long-term goals for each strategic pillar.



## **Raising Our Voice:** *Advocacy and Public Affairs*

Strategic government relations, at all levels of government, matters.



## **Amplify the Value of Consulting with Mortgage Professionals:** *Communications and Marketing*

Communicating effectively, internally and externally, builds value for all.



## **Championing Professional Excellence:** *Education and Professional Development*

Training is paramount for the compliance, accreditation, and advancement of members.



## **Collaborating, Learning, and Engaging Together:** *Events and Networking*

Members are stronger together than they are alone.



## **Engage, Empower and Support Our Members:** *Membership*

Providing value to existing members is a constant focus. Growth in membership is important.



# Raising Our Voice: *Advocacy and Public Affairs*

## Short-Term (1 year)

### Strategic Goal:

MPC's voice and policy solutions are presented to government at all levels and our recommendations are included in key government documents and materials.

### Strategic Objectives:

Develop a public affairs strategy that will strengthen our voice and increase our credibility as a trusted partner. This strategy will include, but is not limited to:

- Ensuring ongoing member engagement with senior decision-makers
- Securing external stakeholder support of MPC advocacy recommendations
- Generating media requests to elevate our thought-leadership profile to policymakers.

### Why this matters:

To strengthen MPC's position as a reliable industry expert to government officials and decision-makers.



# Raising Our Voice: *Advocacy and Public Affairs*

## Medium-Term (3 year)

### Strategic Goal:

MPC is a trusted and reliable industry partner to government at all levels.

### Strategic Objectives:

Be recognized as a critical coalition partner on mortgage and housing policies and advocacy positions by expanding our public affairs strategy to ensure:

- MPC's profile is enhanced by securing a government representative for events at federal and provincial levels
- MPC's status as a subject matter expert is showcased across all media outlets and platforms

### Why this matters:

To ensure our voice and expertise are valued and sought after on issues of material and competitive interest to our members.



# Raising Our Voice: *Advocacy and Public Affairs*

## Long-Term (5 year)

### Strategic Goal:

MPC is recognized by governments at all levels as **THE** voice of the mortgage sector and an influential thought leader in the national housing space.

### Strategic Objectives:

Successful completion of the foundational public affairs strategy, MPC has built a reputation for trusted, reliable and credible thought-leadership that supports the value-add of mortgage professionals via:

- MPC recommendations and opinions are reported on by the media and supported by other housing industry stakeholders
- MPC is recognized as the national voice of the mortgage industry and surpasses all other mortgage-related stakeholders in the depth and breadth of our advocacy
- Media outlets proactively reach out to MPC, recognizing our status as the key thought-leader in the housing sector

### Why this matters:

To ensure MPC advocacy recommendations and solutions are sought before, rather than after, a legislative or policy decision is made.



# Amplify the Value of Consulting with Mortgage Professionals: *Communications and Marketing*

## Short-Term (1 year)

### Strategic Goal:

Improve consumers' understanding of the value of the services offered by accredited mortgage professionals in the Canadian mortgage industry.

### Strategic Objectives:

Develop a holistic and comprehensive communications strategy that reflects the strategic goals of all departments, and supports the credibility and reputational capital of MPC to and for its members. This will include:

- Educational campaigns: Launch a series of educational campaigns across multiple channels (social media, webinars, workshops) to demystify mortgage processes and highlight the benefits of working with accredited professionals. This will enhance MPC brand reputation which will then drive traffic to our members.
- Content marketing: Work with various departments to develop and distribute valuable, easy-to-understand content that addresses common questions and concerns of Canadian consumers regarding mortgages across all MPC platforms
- Customer success stories: Share real-life stories of how MPC members have helped consumers navigate the complexities of the mortgage market, emphasizing the personal and financial benefits

### Why this matters:

Fostering trust and credibility among Canadian consumers will enhance MPC's brand reputation and recognition within our sector and beyond, driving traffic to our members.



# Amplify the Value of Consulting with Mortgage Professionals: *Communications and Marketing*

## Medium-Term (3 year)

### Strategic Goal:

Elevate our profile as **THE** authoritative voice of the mortgage industry and leader in housing across the country.

### Strategic Objectives:

Continue to develop and roll-out communications strategy, emphasizing thought-leadership, media engagement and strategic partnerships that will reinforce MPC's leadership position across the housing sector. This will include:

- Regularly publishing white papers, research reports, and opinion pieces on pressing industry issues, future trends, and policy recommendations.
- Communicate public affairs wins and achievements across all platforms and regularly reinforce with media to cement status as influential and action-oriented industry leader.
- Forge partnerships with related industry bodies (regulators, other associations), educational institutions, and governmental agencies to co-create content and host events that reinforce MPC's leadership position.

### Why this matters:

Media outlets, industry allies and other stakeholders turn to our expertise and materials for credible, reliable data and thought-provoking analysis. This allows us to help shape the narrative that will support our key policy positions and brand growth.





# Amplify the Value of Consulting with Mortgage Professionals: *Communications and Marketing*

## Long-Term (5 year):

### Strategic Goal:

MPC influences the direction of the market, offering valuable insights that are relevant to diverse audiences in support of our members.

### Strategic Objectives:

Successful completion of inaugural communications strategy, with MPC now positioned as the industry thought-leader that media, stakeholders, and policy-makers turn to for insights and analysis. This is further supported by:

- Insight and trend analysis: Invest in market research and data analysis to identify emerging trends and provide forward-looking insights that benefit both members and the broader industry.
- Educational programs: Develop comprehensive educational programs aimed at different segments of the market, including potential homebuyers, current homeowners, and industry professionals, to reinforce the value of accredited mortgage professionals.

### Why this matters:

By building a reputation for trusted, reliable and credible communications materials that support the value-add of mortgage professionals, MPC will ensure its influential thought-leadership status across the housing ecosystem.



# Championing Professional Excellence: *Education and Professional Development*

## Short-Term (1 year)

### Strategic Goal:

Championing standards and professionalism to amplify and strengthen what it means to be a mortgage professional.

### Strategic Objectives:

Develop a professional development strategy that focuses on new educational offerings and professional development opportunities so that MPC continues to be seen as one of the leading providers of professional development in the industry.

### Why this matters:

Enhancing the level and quality of professional development in the industry to reinforce MPC as a leading education provider.



# Championing Professional Excellence:

## *Education and Professional Development*

### Medium-Term (3 year)

#### Strategic Goal:

Expand MPC's educational footprint through strategic institutional partnerships to secure additional professional development opportunities for members.

#### Strategic Objectives:

Advance our professional development strategy to ensure MPC is a sought-after industry partner for subject matter experts, educational institutions, and regulators, which will enhance the professionalism of our members and industry writ large.

#### Why this matters:

Partnering with industry experts and educational institutions in order to enhance the suite of course options and overall professionalism of the industry.



# Championing Professional Excellence: *Education and Professional Development*

## Long-Term (5 year)

### Strategic Goal:

Become the national standard and the nationally recognized leader for mortgage industry education.

### Strategic Objectives:

Successful completion of the foundational professional development strategy has set up MPC as the nationally-recognized, leading industry provider of educational opportunities and is seen as the professional standard in mortgage industry education by providing cutting-edge training on new, emerging trends, and best practices that will set mortgage professionals up for success.

### Why this matters:

To be seen as the professional standard in industry education that will set mortgage professionals up for success in their business.



# Collaborating, Learning, and Engaging Together: *Events and Networking*

## Short-Term (1 year)

### Strategic Goal:

MPC events are recognized as helping attendees become better mortgage professionals.

### Strategic Objectives:

Develop an events strategy to ensure attendees are provided with actionable insights, practical skills, and industry knowledge that significantly contribute to their effectiveness and success as mortgage professionals, as demonstrated by surveys and participant feedback.

### Why this matters:

Attending MPC events will help members connect, engage, foster relationships, and share best practices. This will all help attendees be better, more competitive mortgage professionals.



# Collaborating, Learning, and Engaging Together: *Events and Networking*

## Medium-Term (3 year)

### Strategic Goal:

Establish our events as the premier platform for our industry, recognized nationally for thought leadership and unparalleled networking opportunities. Increase the number of first-time conference attendees.

### Strategic Objectives:

Continue to leverage our events strategy to forge partnerships with influential organizations, industry leaders, and key stakeholders to amplify the reach and credibility of MPC events. Identify opportunities to collaborate and enhance the reputation of our events as a premier industry platform via:

- Co-hosted sessions and joint marketing initiatives to enhance the reputation of our events as the premier industry platform
- Explore opportunities for a new ticketing platform, specialized session tracks and workshops to elevate event experience for attendees

### Why this matters:

Strengthening and reinforcing MPC's brand value as an industry partner and thought leader will drive reputational capital, credibility and fiscal sustainability. A large percentage of first-time attendees to our conference event become repeat attendees.



# Collaborating, Learning, and Engaging Together: *Events and Networking*

## Long-Term (5 year)

### Strategic Goal:

Elevate our events offerings and reputation through continuous innovation to ensure MPC is **THE** gold standard of event experiences.

### Strategic Objectives:

Successful completion of the foundational events strategy, MPC has built a reputation for being at the forefront of new trends and best practices in the mortgage industry and event management sector space. Our events are seen as critical, useful, and engaging, with an emphasis on the value-add of mortgage professionals.

### Why this matters:

Ensuring our relevance over the long-term requires that MPC stays ahead of industry trends. We will consistently incorporate new technologies, ideas, and formats to be a leading and influential place for mortgage professionals to want to be.





# Engage, Empower and Support Our Members: *Membership*

## Short-Term (1 year)

### Strategic Goal:

Constant and consistent focus on member retention and new member recruitment across the mortgage channel.

### Strategic Objectives:

Leverage and foster a strong sense of community and engagement among members through targeted events, networking opportunities and specialized resources that are designed to increase member satisfaction and generate additional word of mouth promotion of the association.

### Why this matters:

Continuing to be the trusted source of value-add services and benefits for members regardless of economic headwinds or tailwinds will reinforce reputational credibility and capital across the industry.







# Engage, Empower and Support Our Members: *Membership*

## Medium-Term (3 year)

### Strategic Goal:

Member engagement to demonstrate value: Championing mortgage professionals through awareness, resources and excellence to support our members' needs.

### Strategic Objectives:

Continue to invest in the sense of community by encouraging members to actively engage with the association by way of advisory council participation, government relations activity, networking events and social media.

Reinforce value-add of membership by establishing strategic partnerships with key industry players and looking for opportunities to provide members with state-of-the-art exclusive resources and benefits to help them succeed in their business.

### Why this matters:

Strengthening member engagement will help foster a stronger sense of community, proactively reinforce the value of MPC, and amplify opportunities to collaborate on issues of national importance.





# Engage, Empower and Support Our Members: *Membership*

## Long-Term (5 year)

### Strategic Goal:

MPC is recognized as setting the industry standard for membership experience.

### Strategic Objectives:

Continuously enhancing member benefits, investing in advanced technology, and gathering regular feedback for continuous improvement in order to ensure MPC is the only recognized national association with 100% of all eligible corporations as members.

### Why this matters:

Leveraging our position as the national advocate for mortgage professionals through the collective power of one unified voice will strengthen our influence and credibility.

