

Project	Accountability	Output type	Objective	Audience
FAQs	Adviser Awareness	Webpage / PDF download	Pool commonly asked questions by people new to the subject to create a useful learning resource	Intermediaries and other mortgage professionals
Client-facing guide to energy saving	Adviser Awareness	PDF branded GMAI or whitelabelled (or Energy Savings Trust)	Create a 'neutral' guide for consumers on energy saving that isn't lender affiliated - making it suitable for brokers to use at the start of the consumer journey	Intermediaries
PR strategy - mortgage industry	Adviser Awareness	Target	E.g. x number of press releases / media appearances by x deadline - raise awareness of group and activities	Internal / Steering
Adviser case studies	Adviser Awareness	Blog / podcast series	Share examples of real-world consumer journeys other advisers / firms can learn from	Intermediaries and other mortgage professionals
SEO and website analytics audit	Adviser Awareness	Metrics gathering and monitoring / Target	Find out how we rank on Google for various keywords, and reporting on media traffic (set targets / deadlines)	Internal / Steering
Website & social content pipeline / calendar	Adviser Awareness / AMI	Shared spreadsheet	Keep track of content in pipeline and ensure steady output stream - also can use to share with GMAI Steering	Internal / Steering
Qualifications directory	Knowledge Building	Webpage	Signpost to all current green / sustainable finance quals	Intermediaries and other mortgage professionals
Government funding / support / signposting directory (review 'where can I?')	Knowledge Building	Webpage	Adviser reference guide to support conversations - needs disclaimer as only accurate at date of publication	Intermediaries and other mortgage professionals
Myth busting green tech / retrofitting	Knowledge Building	Blog / interview subject matter expert	Challenge misconceptions around retrofitting and green home tech	Intermediaries and other mortgage professionals
Broker focus group	Knowledge Building	Discussion forum / regular virtual meet	Gain feedback from practising brokers on what worked / didn't work in training webinars, and what's coming next	Select group of intermediaries (or other professionals connected to advice function)
Cost saving calc tools directory	Knowledge Building	Webpage	Collate all lender and other cost-saving tools aimed at consumers looking to save on energy bills / seeking retrofit guidance	Intermediaries and other mortgage professionals
Simplify / break down the broker handbook	Knowledge Building	Factsheet series	Turn broker handbook into actionable learning - series of 1-page factsheets	Intermediaries and other mortgage professionals
Events calendar for rest of 2024; diary reminder to redo for 2025	Outreach & Engagement	Spreadsheet / PDF	Share info about networking / learning opps in green home finance	Intermediaries and other mortgage professionals
Presentations repository	Outreach & Engagement	Shared dropbox folder	Ensure consistent messaging in comms and share/reuse content	Internal - sign-off needed before lifting content (especially if not for a GMAI presentation)
Stakeholder map	Outreach & Engagement	Spreadsheet	Create an address book for webinar speakers / key stakeholders / subject matter experts	Internal - co-leads and SG to have access; volunteers can request introductions
Calling card (1-pager on who we are)	Outreach & Engagement	Infographic	To aid outreach by giving a quick explainer of who we are	Potential GMAI recruits & wider (ext) stakeholders
PR strategy - external	Outreach & Engagement	Target	PR impact outside mortgage trade press - x number of press releases / media appearances by x deadline	Internal / Steering
Presentations / speaking opps - spreading the word	Outreach & Engagement	Metrics gathering and monitoring	Keep track of in-sector speaking events done, networking events / conferences attended / connections made	Internal / Steering
Attending networking events outside industry	Outreach & Engagement	Metrics gathering and monitoring	Keep track of non-mortgage sector speaking events done, networking events / conferences attended / connections made	Internal / Steering
Why I got involved in GMAI videos	All / Outreach & Engagement	Short selfie videos (individual or could be edited together)	Generate interest and show human side of initiative - 30 sec video answering same 3 Qs, who, why joined, future hopes	Potential GMAI recruits & intermediaries and other mortgage professionals
FCA / regulatory policy resources page	Setting Standards	Webpage	Summarise all policy docs / outputs to date on green home lending	Intermediaries and other mortgage professionals
Business case studies (advice process, business change)	Setting Standards	Blog / podcast series	Show what firms are doing re their green strategy / advice process	Intermediaries and other mortgage professionals
Bi-monthly 'discussion papers' inviting debate and feedback	Setting Standards	Debate blog + google form (series) + feedback summary	Spark industry discussions on industry practice to help inform policy landscape	Intermediaries and other mortgage professionals - esp risk and policy functions
Jargon buster - index of green terms, acronyms and orgs	Setting Standards	Spreadsheet / searchable webpage index of terms	Go-to jargon-buster resource, similar to the one on the WIM website re general mortgage jargon	Intermediaries and other mortgage professionals
Green agenda policy timeline (already made but needs update)	Setting Standards	Webpage	Already exists but needs review / update - https://greenmortgageadvice.uk/the-green-calendar/	Intermediaries and other mortgage professionals
Round #2 Green Visioning Workshop	All	In-person meeting	Generate ideas for GMAI workstream outputs and reinvigorate volunteer taskforce	GMAI volunteers and potential new recruits