

# The 2026 Home Builder Marketing Plan Workbook

A 10-section, fully fillable framework for residential builders, custom home builders, and remodelers. Built around the 2026 channel mix, CPL benchmarks, and the long-cycle nurture habits that separate referral-dependent builders from compounding pipelines.

24 PAGES · FILLABLE · FREE

**Prepared for:**

YOUR BUILDING COMPANY

**Plan period:**

12 MONTHS FROM START

**QUICK START**

# How to use this workbook

This workbook is the operational companion to [trymaas.com/blog/marketing-plan-template-for-home-builders](https://trymaas.com/blog/marketing-plan-template-for-home-builders). Read the guide once for context, then fill out one section per week for the next ten weeks — by the time you finish, you will have a complete operating plan plus a measurement dashboard for the year ahead.

## THE TEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Buyer personas (three)
4. Competitive analysis
5. Brand positioning statement
6. Marketing goals & KPIs
7. Customer journey map
8. Channel strategy matrix
9. Content & social calendar
10. Budget allocation & measurement

**Time budget.** Each section takes 30 to 60 minutes the first time through. Block one focused hour per week. Do them in order — section 5 (positioning) is only credible after sections 1–4 are honest.

## NEED HELP?

If you'd rather have a team run this for you — claim the listings, build the nurture engine, produce the home tours, run the ads, and report on it weekly — that is exactly what the home builder marketing team at MaaS by CodeSM does for clients every day. Visit [trymaas.com/get-a-demo](https://trymaas.com/get-a-demo) to book a benchmarking call.

SECTION 1 · FOUNDATION

# Business snapshot

The one-page foundation. If you can't fill this out in plain language, every downstream marketing decision will read as "quality craftsmanship for over 25 years" — which is what every competitor is also saying.

COMPANY NAME

YEAR FOUNDED

SERVICE AREA (CITIES / COUNTIES / RADIUS)

BUILD TYPE

TYPICAL PRICE BAND PER HOME (OR PER SQUARE FOOT)

TYPICAL BUILD CYCLE LENGTH (CONTRACT TO KEYS)

ANNUAL REVENUE (LAST FULL YEAR) AND # OF HOMES/PROJECTS CLOSED

YOUR ONE-SENTENCE DIFFERENTIATOR — "WE ARE THE [CATEGORY] THAT [DOES X UNIQUELY WELL] BECAUSE [REASON TO BELIEVE]"


THE 3 THINGS CLIENTS MOST FREQUENTLY SAY IN TESTIMONIALS

SECTION 2 · HONEST INTERNAL AUDIT

# SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about the market around you. Every weakness is a message you should not be using. Every opportunity is a campaign you haven't run yet.

**STRENGTHS**

What we do better than competitors (design, speed, transparency, warranty, price)

**WEAKNESSES**

Where we lose to competitors (price, timeline, communication, customization)

**OPPORTUNITIES**

Market gaps in your zip codes we could capture

**THREATS**

New competition, material costs, interest rate sensitivity, neighborhood saturation

## TOP 3 TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING


THE ONE WEAKNESS WE NEED TO FIX BEFORE SCALING MARKETING SPEND


THE SINGLE BIGGEST OPPORTUNITY TO ACT ON THIS YEAR

SECTION 3 · BUYER PERSONAS · PERSONA 1

# The Active Searcher

Within 0–3 months of a buying decision. Comparing 2–4 builders. Ready to schedule site visits. Lowest CAC, highest urgency, but highest competition. Your job: be the easiest to contact and the fastest to respond.

AGE RANGE

BUILD BUDGET RANGE

HOUSEHOLD INCOME

LOT STATUS (OWNED / SHOPPING)

PRIMARY RESEARCH CHANNEL

HOW THEY TYPICALLY FIND US

FINANCING READINESS

DECISION TIMELINE

WHAT WOULD MAKE THEM CHOOSE US OVER A COMPETITOR IN THEIR FIRST 2 CONVERSATIONS?


ONE MARKETING MESSAGE THAT WOULD RESONATE WITH THIS PERSONA


SECTION 3 · BUYER PERSONAS · PERSONA 2

# The Researcher

3–12 months out. Gathering inspiration. Building a vendor short-list. The persona where content marketing and SEO compound hardest. Most builders lose this segment to competitors who showed up consistently for nine months while you focused on the active searchers.

AGE RANGE

BUILD BUDGET RANGE

HOUSEHOLD INCOME

LOT STATUS (OWNED / SHOPPING)

PRIMARY RESEARCH CHANNEL

HOW THEY TYPICALLY FIND US

FINANCING READINESS

DECISION TIMELINE

WHAT EDUCATIONAL CONTENT WOULD ADVANCE THEM FROM RESEARCH TO FIRST CONTACT?


WHAT EMAIL NURTURE CADENCE KEEPS US TOP OF MIND WITHOUT BEING PUSHY?


SECTION 3 · BUYER PERSONAS · PERSONA 3

# The Dreamer

12+ months out. Scrolling Houzz. Saving Pinterest boards. Following builders on Instagram. Long-nurture target. Often becomes next year's pipeline if you stay visible without being pushy.

AGE RANGE

BUILD BUDGET RANGE

HOUSEHOLD INCOME

LOT STATUS (OWNED / SHOPPING)

PRIMARY RESEARCH CHANNEL

HOW THEY TYPICALLY FIND US

FINANCING READINESS

DECISION TIMELINE

WHAT INSPIRATIONAL CONTENT (VISUALS, LIFESTYLE) EARNS THE SAVE / FOLLOW / SHARE?


WHAT SIGNAL TELLS US THIS DREAMER IS MOVING INTO RESEARCHER MODE?


SECTION 4 · KNOW THE FIELD

# Competitive analysis

Pick five direct competitors in your service area. Audit each one and find the gap you can own.

COMPETITOR	PRICE BAND / SQFT	BUILD TYPE	GOOGLE RATING + REVIEWS	HOUZZ PORTFOLIO	WHERE WE BEAT THEM
1					
2					
3					
4					
5					

## SYNTHESIS

THE clearest gap in the local market we can own


THE ONE competitor we should monitor weekly


SECTION 5 · THE ONE-SENTENCE TEST

# Brand positioning

Fill in the blanks. This sentence will drive every word of marketing copy you write for the next year. If you can't write it in one sentence, you have a portfolio — not a position.

**Format:** "For [target buyer], [your company] is the [category] that [differentiator] because [reason to believe]."

TARGET BUYER (WHICH PERSONA, IN ONE PHRASE)

COMPANY NAME

CATEGORY (BE SPECIFIC — NOT "HOME BUILDER," BUT "SEMI-CUSTOM BUILDER IN THE \$600K-\$1.2M RANGE")

DIFFERENTIATOR (WHAT MAKES YOU BETTER/DIFFERENT FOR THIS SPECIFIC BUYER)

REASON TO BELIEVE (THE CREDIBILITY — DESIGN AWARDS, COMPLETED HOMES, WARRANTY TERMS, IN-HOUSE TEAM)

YOUR FULL POSITIONING SENTENCE

SECTION 6 · WHAT "WINNING" LOOKS LIKE

# Marketing goals & KPIs

Three to five SMART goals — Specific, Measurable, Achievable, Relevant, Time-bound. For builders, lead quality and through-funnel conversion matter more than raw volume.

GOAL (SMART)	CURRENT	TARGET	BY WHEN	OWNER
1				
2				
3				
4				
5				

**Example goals to spark ideas:** 120 qualified leads by Q4 (up from 78 in 2025) · Marketing-sourced CPL under \$250 average · Site-visit-to-contract conversion 14% → 22% · Email list 1,400 → 4,000 · 1.0% MoM organic traffic growth · Maintain 4.6+ average Google rating across all communities.

## WEEKLY KPI CHECK-IN TEMPLATE

METRIC	MON	TUE	WED	THU	FRI	SAT	SUN
New leads							
Site visits booked							
Avg response time							
Contracts signed							

SECTION 7 · FROM DISCOVERY TO ADVOCACY

# Customer journey map

The home builder journey is long — 6 to 18 months from first awareness to contract, plus the build phase. Each stage gets a channel and a touchpoint. Most builders miss stages 3, 8, and 9.

STAGE	WHAT HAPPENS	CHANNEL(S)	MESSAGE / ACTION
1. Awareness			
2. Consideration			
3. Research (months)			
4. First contact			
5. Site visit			
6. Proposal			
7. Contract			
8. Build phase			
9. Handoff			
10. Advocacy			

**The two most under-built stages** are #3 (Research) and #8 (Build). A 12-email educational nurture series + a "build journal" social cadence during the project doubles referral rates for most builders.

SECTION 8 · WHERE THE TIME AND BUDGET GOES

# Channel strategy matrix

The 2026 channel mix for a residential builder. Mark each channel as Active / Test / Skip and assign an owner.

CHANNEL	WHAT IT DOES	CADENCE	STATUS (A/T/S)	OWNER
<b>Local SEO + GBP</b>	Top of Map Pack for "[city] custom home builders"	Weekly Posts		
<b>Organic SEO (blog + portfolio)</b>	Compounding long-cycle research traffic	2-4 posts/mo		
<b>Google Ads</b>	High-intent search capture	Always-on		
<b>Meta Ads</b>	Awareness + retargeting + lead-gen	Always-on		
<b>Houzz Pro</b>	Credibility + portfolio destination	Weekly uploads		
<b>Zillow / Realtor / NHS</b>	Spec + inventory homes visibility	Per-property		
<b>Instagram + Reels</b>	Discovery, design inspiration, BTS	4-6 posts/wk		
<b>YouTube</b>	Home tours, build process, long-form trust	2/month		
<b>Email nurture</b>	Research-phase warm-up (12-email drip)	Bi-weekly		
<b>Direct mail</b>	ZIP-targeted prospecting	Quarterly		
<b>Events / Parade of Homes</b>	High-intent in-person	Seasonal		

SECTION 9 · CONTENT & SOCIAL

# Content rotation framework

The 2026 mix for builders: **50–60% short-form video** (Reels, TikToks, Shorts — 15–60 seconds), **20–25% carousels**, **15–20% long-form video** (YouTube), **5–10% single image / culture**. Cadence: 4–6 social posts per week + 2 long-form videos per month.

## EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	HOOK EXAMPLES
1. Finished home tours	Reel + YouTube	1–2x/wk	Interior walk-through, hero shots, drone exterior
2. Build in progress	Reel	2x/wk	Time-lapses, framing, milestones, before/during
3. Design trends	Carousel / Reel	1x/wk	"What's working in 2026" — open kitchens, dual primary suites
4. Behind the scenes	Reel	1x/wk	Supplier visits, jobsite mornings, team day-in-life
5. Process explainers	Carousel / YT	1x/wk	"How we plan a custom build in 9 steps"
6. Neighborhood spotlights	Carousel	2x/mo	Schools, amenities, lot tours, drive routes
7. Client stories	Reel / video	1x/mo	The keys-handed-over moment, testimonial cut
8. Before / after	Carousel	1x/wk	Renovations, lot transformations, demo-to-move-in

**Local SEO bonus.** Since July 2025, Instagram content is indexed by Google. A captioned Reel showing a finished build with the city and build type can appear in Google search results for the same query. Caption every Reel with the location keyword.

SECTION 9 · 30-DAY CALENDAR

# 30-day content calendar template

Plan four weeks at a time. Fill in the category and the post idea for each day.

WEEK	MON	TUE	WED	THU	FRI	SAT	SUN
Week 1							
Week 2							
Week 3							
Week 4							

## 12-EMAIL NURTURE SERIES OUTLINE

#	SUBJECT / THEME	CONTENT
1	Welcome + what to expect	
2	Our 9-step build process	
3	Custom vs semi-custom vs spec	
4	Budgeting realistically	
5	Lot selection guide	
6	Design trends 2026	
7	Construction-to-perm financing	
8	A client story	
9	Inside our warranty	
10	Common build-phase	

SECTION 10 · BUDGET ALLOCATION

# Budget allocation worksheet

Established builders should spend **1.8–3.2% of revenue** on marketing. Growth-stage or luxury custom: **3–5%**. 55–70% should go to digital. A typical \$20K/month digital allocation:

CHANNEL	EXAMPLE \$/MO	YOUR \$/MO	EXPECTED OUTCOME
SEO retainer + content	\$4,500		1.0% MoM organic traffic growth, compounding
Google Ads	\$5,000		CPL \$150–\$300, 25–50 qualified leads/mo
Meta Ads	\$2,500		CPL ~\$45, retargeting 3–5x ROAS
Houzz Pro	\$600		Credibility + portfolio leads (mixed quality)
Zillow / Realtor / NHS	\$1,800		Per-listing visibility on inventory homes
Email + CRM tool	\$400		Nurture series + source tracking
Photo + video production	\$2,500		1 monthly shoot, 30+ assets per home
Reputation management	\$400		24-hour response SLA, review velocity
Contingency / reallocation	\$2,300		Double down on what's working
<b>Total / month</b>	<b>\$20,000</b>		—

**The contingency line** is what lets you move budget mid-month into a campaign that is working, instead of waiting for next month and missing the curve.

SECTION 10 · TOOLS & MEASUREMENT

# Tech stack & measurement dashboard

## TECH STACK CHECKLIST

- CRM with lead-source tracking (HubSpot, Salesforce, Buildertrend, Procore, BuilderMT, JobNimbus)

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- Email marketing + automation (HubSpot, Mailchimp, ActiveCampaign, Klaviyo)

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- Google Business Profile claimed + optimized for every model home and office

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- Apple Business Connect claimed + Showcases active

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- Houzz Pro account with portfolio updated quarterly

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- Zillow / Realtor / Trulia / New Home Source listings live for inventory homes

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- Call tracking with dynamic numbers (CallRail, Invoca)

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- Social scheduling tool (Later, Buffer, Metricool, Meta Business Suite)

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- Reputation monitoring (Birdeye, Reputation, Podium)

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- GA4 connected to website with conversion events configured

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- UTM parameters on every paid + social link, with naming convention documented

## WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
New leads				
Cost per lead (blended)				
Site visits booked				
Site-visit → contract %				
Average response time				
Contracts signed				
Organic search traffic				

SECTION 11 · THE YEAR AHEAD

# 12-month action plan

Plan one focus per month. Foundation Q1, content + nurture Q2, paid scale Q3, reputation + repeat business Q4.

MONTH	FOCUS	WHAT SHIPS THIS MONTH
Month 1	Foundation: positioning + listings + photos	
Month 2	SEO audit + 3 cornerstone content briefs	
Month 3	Email nurture series live + CRM source tracking	
Month 4	Google Ads launch (brand + local intent)	
Month 5	Meta retargeting + first 2 YouTube tours published	
Month 6	Mid-year review; budget reallocation	
Month 7	Houzz portfolio refresh + Zillow inventory updates	
Month 8	Parade of Homes / open house programming	
Month 9	Reputation push: 20+ Google reviews	
Month 10	Q4 lead-gen push for next year's pipeline	
Month 11	Repeat client / referral campaign	
Month 12	Annual review; plan next year	

SECTION 12 · WHAT GOES WRONG

## Common mistakes to avoid

Six patterns explain most builder marketing failures. Check each one against your current operation — and fix what's broken before scaling spend.

- No lead nurture for the 6–18 month research-phase buyer.** Send a 12-email educational drip series. Builders that do this convert 2–3x more of their cold leads.

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- Underinvesting in SEO.** The highest-ROI channel for residential builders (400–450%). Most builders treat it like a one-time website launch.

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- Houzz only / Houzz everything.** Houzz is one channel and the leads skew price-shopper. Use it for credibility, not for primary lead-gen.

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- No response-time discipline.** Calls answered in under 5 minutes convert at 7x the rate of calls answered in 30 minutes. Most builders take 4+ hours.

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- No source tracking in the CRM.** If you can't attribute closed contracts back to channel, you can't optimize budget. Add a required "lead source" field.

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- No video.** YouTube is a discovery engine for premium custom builders. The first builder in a market to take video seriously buys a 12–24 month moat.

### YOUR TOP 3 FIXES FOR THIS QUARTER


SECTION 13 · IF YOU'RE STARTING FROM SCRATCH

# The first 60 days

Don't try to do all ten sections in one weekend. The order that works for most builders. Roughly 12 hours in month one, 10 hours / month after.

WHEN	DO THIS	TIME
<b>Week 1</b>	Sections 1, 3, 5: snapshot + personas + positioning	2 hours
<b>Week 2</b>	Claim + optimize Google Business Profile + Apple Business Connect. Upload 20 fresh photos. Start asking happy clients for Google reviews.	4 hours
<b>Week 3</b>	Audit website for SEO basics — title tags, meta descriptions, location pages, portfolio structure. Identify 3 priority keyword targets per local market.	6 hours
<b>Week 4</b>	Stand up email + CRM. Build the 12-email nurture series for research-phase leads.	6 hours
<b>Month 2</b>	Launch Google Ads (branded + high-intent local). Start one Meta retargeting campaign. Begin a weekly Instagram + YouTube cadence.	8 hours
<b>Month 3</b>	Layer in source tracking. Build weekly dashboard. Audit Houzz, Zillow, Realtor placements.	4 hours
<b>Quarter 2</b>	Add SEO retainer with a content roadmap. Plan next 6 cornerstone content pieces. Begin direct-mail and event programming.	varies

**The math:** 12 hours in month one, 10 hours per month after that, and \$15K–\$30K/mo on digital → you will be ahead of 80% of local builders by year-end. 19

YOU HAVE THE PLAN. NOW RUN IT.

# Want a team to run it for you?

MaaS by CodeSM is the marketing team for home builders that don't have time to be their own marketing team. We claim and optimize the listings, build the email and SMS nurture engines, produce the home tours and BTS content, run the ads, manage the reputation, and report on it weekly. One contract. One team. Senior strategists, paid media operators, content producers, and analysts.

## 01 · AUDIT

### 30-minute marketing audit

We pull your Google Business Profile, Houzz, Zillow, Instagram, and Google Ads data and show you exactly where you're leaving leads on the table.

## 02 · BENCHMARK

### Compare yourself to the field

We benchmark your listings, social, reviews, and ad ROAS against the top three competitors in your zip code and price band.

## 03 · PLAN

### A 90-day plan you can actually run

You leave with a concrete 90-day plan — channels, budget, content, and KPIs — whether you hire us or not.

## 04 · RUN

### Or we run it for you

If you want a team executing, we plug in across SEO, content, paid, email, nurture, listings, and reporting.