

maas
a codesm company

The 2027 Moving Company Marketing Plan Workbook

A fill-in-the-blanks marketing plan built for how moving companies actually win work: peak-season demand, fast quote follow-up, recent reviews and a trustworthy first impression. Work through the ten sections, then use the 12-month plan and weekly dashboard to keep the trucks booked in July and in January.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our moving company marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for local and long-distance residential movers, commercial and office movers, and van line agents. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

What do customers praise in reviews? Full-time crews, low claims rate, specialty skills (pianos, fine art, senior moves), storage, van line network, on-time record, review count and rating.

WEAKNESSES

Where do you lose jobs? Slow callbacks, unclear pricing, dependence on aggregator leads, thin off-season, few reviews outside your home city, no commercial references, missing USDOT number on ads or trucks.

OPPORTUNITIES

Corporate relocation accounts, office and clinic moves, senior living communities, apartment complexes, realtor and property manager referrals, new suburbs, AI answers and map results where competitors are weak.

THREATS

Low-price operators, brokers bidding on your brand name, labor and fuel costs, a cluster of bad reviews after a rough peak week, large damage claims, falling home sales, the industry's scam reputation.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Deadline Family

A closing date or lease end that will not move.

Selling one home and buying another, or ending a lease, and booking two to six weeks out. Gets three quotes, reads recent reviews closely and wants a firm price and a crew that shows up on time.

MOVE TYPE AND HOME SIZE

MOVE DATE AND BOOKING LEAD TIME

BUDGET SENSITIVITY

BIGGEST FEAR

WHERE THEY SEARCH FIRST

PROOF THAT GETS THEM TO BOOK

WHAT WOULD MAKE THIS FAMILY TRUST A WRITTEN PRICE FROM US OVER A CHEAPER PHONE QUOTE?

WHICH REALTOR, LENDER OR APARTMENT COMMUNITY COULD INTRODUCE US BEFORE THEY START SEARCHING?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Out-of-State Mover

Crossing state lines and worried about getting scammed.

Relocating for a job or retirement and comparing binding and non-binding estimates. Checks the USDOT number, asks about deposits, delivery windows and damage, and often has an employer or relocation company involved.

ORIGIN AND DESTINATION

WHO PAYS (SELF, EMPLOYER, RELOCATION COMPANY)

ESTIMATE TYPE WANTED

DELIVERY WINDOW EXPECTATIONS

SCAM CONCERNS RAISED

DECISION MAKERS INVOLVED

WHERE ON OUR WEBSITE AND IN OUR QUOTE DO WE PROVE WE ARE AN AUTHORIZED CARRIER, NOT A BROKER?

HOW DO WE KEEP THIS CUSTOMER INFORMED BETWEEN PICKUP AND DELIVERY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Facilities Manager

Moving an office, clinic or warehouse floor with no room for downtime.

Responsible for a commercial move with building rules, IT equipment and a hard reopening date. Buys on process, insurance documents and references more than price, and returns for the next expansion.

COMPANY AND INDUSTRY

SQUARE FOOTAGE AND HEADCOUNT

MOVE WINDOW (AFTER HOURS, WEEKEND)

INSURANCE AND BUILDING REQUIREMENTS

OTHER VENDORS INVOLVED (IT, FURNITURE)

APPROVAL PROCESS AND BUDGET OWNER

WHAT COMMERCIAL MOVE STORY OR REFERENCE CAN WE SHOW THIS BUYER TODAY?

WHO ELSE IN THEIR COMPANY WILL NEED TO APPROVE US, AND WHAT DO THEY NEED TO SEE?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	GOOGLE RATING AND REVIEW COUNT	REVIEWS IN THE LAST 90 DAYS	SERVICES AND SPECIALTIES	PRICING TRANSPARENCY AND ESTIMATE TYPE	USDOT, MC OR STATE NUMBER SHOWN	MAP PACK POSITION FOR CORE SEARCHES
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For families moving within the Tampa Bay area on a closing deadline, Harbor & Pine Moving (a fictional company) is the local mover that gives a written, itemized price after a free in-home survey, because every crew is our own full-time team and every move has one coordinator from quote to delivery.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Raise booking rate from 28% to 38% by September 30, 2027. Grow Google reviews from 140 to 260 by December 31, 2027, with at least 12 new reviews every month, including November through February. Cut the share of booked jobs from aggregators from 45% to 25% by year-end while holding total booked jobs flat or higher. Book 30 commercial or office moves between November 2027 and February 2028.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
Leads by source					
Median speed to first response					
Booking rate by source					
Cost per booked job by source					
New Google reviews and 90-day average rating					
Booked revenue for the next 30 days					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Trigger	A home sale, lease end, job offer or office lease renewal sets a date.	Realtor and property manager referrals, past-customer emails, corporate relocation contacts	
Search	Searches movers near me or asks an AI assistant for a reliable mover.	Google Business Profile, Local Services Ads, Search Ads, AI answers, Yelp	
Shortlist	Compares recent reviews, photos and whether the company looks legitimate.	Reviews, real crew and truck photos, USDOT number, pricing and process page	
Quote request	Fills a form, calls or texts, and usually contacts more than one mover.	Website form, call tracking line, chat, automatic text reply within a minute	
Survey and estimate	Walks you through the home and waits for a written number.	In-home or video survey, written binding or non-binding estimate	
Decision	Weighs price, trust and availability, and asks about deposits and valuation.	Follow-up call and text within 24 hours, FAQ page, reviews link	
Pre-move	Feels anxious about packing and the move-day schedule.	Confirmation email, packing guide, FMCSA booklets, arrival window text	
Move day	Judges the crew on punctuality, care and communication.	Crew lead introduction, floor protection, photo updates on long hauls	
Delivery and billing	Checks that everything arrived and the invoice matches the estimate.	Final walkthrough, clear invoice, claims process explained	
Review and referral	Decides whether to recommend you.	Review request within 24 hours, referral ask, storage and next-move follow-up	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Google Business Profile**	Map pack visibility, photos and reviews	Weekly posts, photos after real moves	Free plus 1 to 2 hours per week	
☐	**Review generation**	Rating, recency and review volume	Ask after every move, reply within 48 hours	$50 to $300 per month tool	
☐	**Google Search Ads**	Quote requests on core and route searches	Always on, budget flexed by month	$2,000 to $10,000 per month	
☐	**Google Local Services Ads**	Screened pay-per-lead calls	Always on, dispute bad leads weekly	$500 to $3,000 per month	
☐	**Organic SEO**	City, route, cost and service pages that compound	2 to 4 pages per month	$1,500 to $4,000 per month	
☐	**Lead aggregators**	Fill new areas or peak gaps only	Seasonal, with a spending cap	Capped and judged on cost per booked job	
☐	**Meta and Instagram**	Retargeting, off-season offers, crew recruiting	3 to 4 posts per week, always-on retargeting	$500 to $2,000 per month	
☐	**Realtor and property manager program**	Warm referrals that book at higher rates	Monthly touch, quarterly lunch-and-learn	Time plus co-branded materials	
☐	**Commercial and corporate outreach**	Office moves and relocation accounts	Weekly in Q4 and Q1	Sales time plus RFP preparation	
☐	**Email and SMS**	Quote follow-up, past customers, storage offers	Automated sequences plus a monthly newsletter	$50 to $300 per month	

SECTION 9 · CONTENT AND SOCIAL

Content framework

About 50% short video of real crews and moves, 25% photos and carousels, 15% website guides that rank and get cited, and 10% team and community posts. Post three to four times a week in peak season and two to three times off-season, and publish two to four website pages a month.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Cost guides	Website page plus short video	1 per month	What a three-bedroom local move really costs in our city, and what changes the price
2. Route pages	Website page	1 to 2 per month	Moving from Dallas to Denver: transit time, what is included and how to plan the week
3. Scam-proofing	Short video and carousel	Monthly	How to check any mover's USDOT number in two minutes
4. Packing and prep	Carousel and printable checklist	Weekly in peak season	The five boxes to pack first, and the one to pack last
5. Behind the scenes	Short video	Weekly	Watch our crew wrap a piano in under ten minutes
6. Commercial moves	Case story and photo set	Quarterly	How we moved a 40-person office over one weekend with zero Monday downtime
7. Partner content	Shareable guide for realtors	Quarterly	A neighborhood moving guide your buyers can use on closing day
8. Storage and off-season offers	Email, social post and landing page	October to February	Winter move dates: more availability and flexible scheduling

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
Google Search Ads and Local Services Ads	35%	Flex by month, heaviest April through August		
SEO, content, photo and video	22%	City, route and cost pages plus real crew footage		
Lead aggregators (capped)	12%	Only where cost per booked job beats other channels		
Reviews, CRM, call tracking, email and SMS	12%	The tools that raise booking rate		
Meta and retargeting	8%	Retarget quote visitors, off-season offers		
Partner and commercial programs	6%	Realtor materials, corporate and office outreach		
Contingency	5%	Peak-week pushes and new-area tests		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] USDOT number shown as U.S. DOT No. in every ad, landing page and truck (interstate movers)
- [ ] Prominent link to FMCSA's Ready to Move publication on the website
- [ ] Rights and Responsibilities booklet link or copy, with signed receipts kept for one year
- [ ] Broker status, MC number and physical address shown if you broker any moves
- [ ] State mover number shown where your state requires it
- [ ] Google Business Profile verified, with categories, service area and 20 or more real photos
- [ ] Google Local Services Ads profile with screening complete
- [ ] Call tracking with dynamic number insertion on the website
- [ ] CRM with a required lead-source field tied to each booked job
- [ ] Automatic text reply within one minute of every web lead
- [ ] Review request text sent after every delivery, no incentives and no gating
- [ ] TCPA consent records for every purchased lead you call or text

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Leads by source				
Median speed to first response				
Booking rate by source				
Cost per booked job by source				
Average job value by move type				
New reviews and 90-day average rating				
Booked revenue for the next 30, 60 and 90 days				
Claims per 100 moves				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	January: finish sections 1 to 6, pull last year's booked jobs by source and month, and run the compliance and trust audit.		☐
Month 2	February: set up call tracking, the CRM source field, instant text replies and the quote follow-up sequence. Start the review engine.		☐
Month 3	March: launch Google Search Ads and Local Services Ads, publish the first five city pages, and list 20 realtors and 10 property managers.		☐
Month 4	April: front-load the peak budget, launch retargeting, publish route pages and cost guides, and cap aggregator spend.		☐
Month 5	May: peak season begins. Watch speed to lead and booking rate daily, and push review requests after every move.		☐
Month 6	June: shift budget to the routes and cities with the lowest cost per booked job. Post real crew video weekly.		☐
Month 7	July: protect the schedule. Use waitlists and flexible-date offers, and keep replying to every review within 48 hours.		☐
Month 8	August: last peak push. Ask happy customers for referrals and line up fall commercial and relocation conversations.		☐
Month 9	September: mid-year review of cost per booked job by source. Cut the weakest channel and plan the off-season offers.		☐
Month 10	October: start commercial and office outreach and corporate relocation pitches. Launch storage and winter-date offers.		☐
Month 11	November: hold reviews and SEO steady through the slow season, and publish partner content for realtors.		☐
Month 12	December: annual review, update personas and positioning, set next year's goals and the monthly budget curve.		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Going dark after Labor Day

Keep reviews, SEO and partner outreach running all year, and use the off-season for commercial and relocation work.

- [ ] We do this today

02 Buying more leads instead of booking more

Fix speed to lead and quote follow-up first. Raising booking rate from 30% to 40% grows revenue without new leads.

- [ ] We do this today

03 Hiding prices, process and paperwork

Publish how estimates, deposits and valuation work so you look nothing like the scams customers have read about.

- [ ] We do this today

04 Missing or misformatted USDOT numbers

Audit every ad, landing page, truck and profile for the U.S. DOT No. format required for interstate movers.

- [ ] We do this today

05 Review gating or review incentives

Ask every customer the same way, offer nothing in exchange, and reply to every review.

- [ ] We do this today

06 One generic page for every city

Build a real page for each city you serve and each common long-distance route.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Write the business snapshot, three personas and positioning statement. Pull last year's booked jobs by source and month.
☐	**Week 2**	Run the trust audit: USDOT format everywhere, Ready to Move link, broker disclosures if any, and 20 real photos on Google.
☐	**Week 3**	Set up call tracking, a required lead-source field, an instant text reply and a three-touch quote follow-up.
☐	**Week 4**	Start the review engine: crew leads ask on site, an automated text after delivery, replies within 48 hours.
☐	**Month 2**	Launch Google Search Ads and Local Services Ads and build the first five city pages.
☐	**Month 3**	Add route pages and cost guides, and start a monthly touch with 20 realtors and 10 property managers.
☐	**Quarter 2**	Before peak: plan capacity against demand, front-load the budget in April, launch retargeting and cap aggregators.
☐	**Year 1**	Compare cost per booked job by source, cut the weakest channel and run commercial and relocation outreach through the off-season.

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for local and long-distance residential movers, commercial and office movers, and van line agents. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

trymaas.com/get-a-demo



The outsourced marketing team for local and long-distance residential movers, commercial and office movers, and van line agents.

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