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The 2027 Real Estate Marketing Plan Workbook

A fill-in plan for agents, teams and small brokerages who want more of their business from people who already know them. Work through it in order and you will finish with your numbers, your clients, your channels, your budget and a weekly scorecard on paper.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our real estate 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 real estate agents, teams and small brokerages. 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

Neighborhood knowledge, a past-client base, a niche such as downsizing, relocation, new construction, investors or a second language, listing results, strong reviews.

WEAKNESSES

Thin reviews, no video, a database scattered across phone, email and old transaction files, slow lead follow-up, a buyer consultation that is not written down.

OPPORTUNITIES

Long-tenured owners in your farm, first-time buyers who need education, Spanish-speaking buyers and sellers, builder, lender and relocation partnerships, neighborhoods no agent covers well.

THREATS

Discount and flat-fee brokerages, portal dependence and rising referral fees, low inventory, rate swings, MLS and portal rule changes, compliance mistakes in ads or texting.

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 Equity-Rich Move-Down Seller

Has been in the home for years and is ready for something smaller or closer to family.

Usually in their 60s or older with significant equity, selling to downsize or to be closer to friends and family. Wants a trusted guide, a plan for the next home and minimal disruption, and often chooses an agent they already know.

YEARS IN THE HOME

ESTIMATED EQUITY

REASON FOR MOVING

NEXT HOME PLAN

WHO ELSE IS INVOLVED IN THE DECISION

TIMELINE

WHAT WOULD MAKE THIS SELLER TRUST YOU WITH BOTH THE SALE AND THE NEXT MOVE?

WHICH PAST CLIENTS OR SPHERE CONTACTS FIT THIS PROFILE TODAY?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Late-Start First-Time Buyer

Has been saving for years and wants the process explained plainly.

Often around 40, renting, worried about rates and monthly payment, and researching listings online for weeks before reaching out. Needs education on financing, offers and the written buyer agreement.

AGE RANGE

PRICE BAND

DOWN PAYMENT SAVED

PRE-APPROVAL STATUS

MUST-HAVE FEATURES

BIGGEST WORRY

HOW WILL YOU EXPLAIN THE BUYER AGREEMENT AND YOUR FEES IN THE FIRST CONVERSATION?

WHAT CONTENT WOULD THIS BUYER FIND BEFORE THEY ARE READY TO CALL ANYONE?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The Move-Up or Relocating Family

Buying and selling at once against a job or school deadline.

Needs to sequence a sale and a purchase, often in a neighborhood they do not know well. Values area expertise, fast communication and a clear plan, and is worth two sides if you win the trust.

CURRENT HOME AND EQUITY

TARGET AREAS

DEADLINE DRIVER

BUY-FIRST OR SELL-FIRST

COMMUTE AND SCHOOL NEEDS

DECISION MAKERS

WHAT WOULD A RELOCATING FAMILY NEED TO SEE FROM YOU TO TRUST YOUR NEIGHBORHOOD KNOWLEDGE?

HOW WILL YOU MANAGE BOTH SIDES OF THE MOVE WITHOUT DROPPING COMMUNICATION?

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	LISTINGS AND CLOSED SIDES IN THE LAST 12 MONTHS	AVERAGE DAYS ON MARKET AND LIST-TO-SALE RATIO	GOOGLE AND PORTAL REVIEW COUNTS	WEBSITE AND NEIGHBORHOOD CONTENT	VIDEO PRESENCE	BROKERAGE BRAND AND NICHE
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 empty-nesters in northwest San Antonio who have been in their homes 15 years or more, the Delgado Group is the downsizing specialist that plans the sale and the next move together, because we partner with a senior move manager and a stager and run every listing on a written 30-day launch plan.*

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. Grow the database from 400 to 900 contacts with permission to email by December 31, 2027. Touch every past client personally at least twice in 2027, plus a monthly email. Close 24 sides in 2027 with at least half from the sphere and past clients. Keep median response time to new online leads under five minutes all year.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
New contacts added to the database					
Sphere and past-client touches completed					
Median lead response time					
Appointments set					
Buyer agreements signed and listings taken					
Pending and closed sides					

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
Dormant	Not thinking about moving, but notices who stays in touch.	Monthly email, social content, annual home-value check	
Trigger	A new job, new baby, empty nest, retirement or loss starts them thinking.	Personal check-ins, life-event content	
Research	Browses listings, checks home values, watches neighborhood videos, reads reviews.	Website, portals, YouTube, Google Business Profile	
First contact	Calls, texts, fills in a form or walks into an open house, and usually talks to only one agent.	Phone, text with consent, lead forms, open houses	
Consultation	Decides whether you are the right agent and what you cost.	Listing presentation or buyer consultation with written agreement	
Prep or search	Sellers prepare and launch; buyers tour and make offers.	Pricing, staging, photo and video, showings	
Under contract	Feels anxious through inspection, appraisal and financing.	Proactive weekly updates	
Closing	Gets the keys and is at peak goodwill.	Thank-you, gift, review request	
Post-close	Settles in and forgets who helped unless reminded.	Move-in check, home anniversary note, annual equity review	
Referral and repeat	A friend asks for an agent, or their own next move begins.	Referral asks, client events, ongoing nurture	

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
☐	**CRM and sphere nurture**	Repeat and referral business	Monthly email, quarterly personal touch, annual home review	$50 to $300 a month for the tool plus mail and events	
☐	**Google Business Profile**	Name and area searches, reviews	Weekly posts, reply to every review	Free, about 1 hour a week	
☐	**Website and hyperlocal SEO**	Neighborhood guides and home-value pages	2 to 4 pages or posts a month	$500 to $3,000 a month	
☐	**Google Search Ads**	Seller and buyer intent	Always on for seller terms, buyer terms tested	$750 to $3,000 a month	
☐	**Meta ads in the housing category**	Listing exposure, seller campaigns, retargeting	Per listing plus always-on retargeting	$300 to $2,000 a month	
☐	**Video (YouTube, Reels, TikTok)**	Neighborhood expertise and listing tours	2 to 4 videos a week	Time plus production	
☐	**Portals**	Buyer lead volume	Ongoing, reviewed quarterly	Subscription or a share of commission at closing	
☐	**Listing marketing package**	Win listings and sell homes	Every listing	Photography, video, floor plans, staging help	
☐	**Open houses and client events**	Meet buyers and future sellers in person	Weekly open houses, 2 client events a year	$100 to $2,500 per event	
☐	**Direct mail**	Farm awareness	Monthly or quarterly	$0.60 to $1.50 a piece	
☐	**Spanish-language marketing**	Reach bilingual buyers and sellers	Matches the English cadence	Translation or a bilingual agent's time	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Plan 50% to 60% short-form video, about 20% carousels and photo posts, and the rest long-form such as YouTube tours, market reports and blog guides. Aim for four to six posts a week and one monthly email.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. Neighborhood guides	Video and blog page	Weekly	Living in Alamo Heights: parks, commutes and the coffee shop everyone walks to.
2. Market updates	Short video and email	Monthly	What homes in your area sold for in October, in 60 seconds.
3. Listing tours	Reel and YouTube	Every listing	Walk through this 4-bedroom with the floor plan on screen.
4. What it costs	Carousel	Twice a month	What $450,000 buys in three neighborhoods right now.
5. Process explainers	Talking-head video	Weekly	The buyer agreement, explained in plain English before you tour.
6. Client stories	Video or photo post	Twice a month	They sold the house they raised three kids in. Here is how we planned the move.
7. Local business spotlights	Reel	Twice a month	Five minutes with the owner of the bakery on Main Street.
8. Home value and equity	Email and post	Quarterly	Curious what your home is worth today? Here is what sold near you.

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 $
Sphere and past-client nurture	25%	CRM, mail, client events and closing gifts		
Listing marketing	20%	Photography, video, floor plans and staging help		
Paid search and Meta lead generation	20%	Seller terms first, housing category on Meta		
Hyperlocal content and video	15%	Neighborhood series and market updates		
Website, SEO and Google Business Profile	10%	Home-value page, neighborhood pages, reviews		
Portal or referral program test	5%	Measured per closed side, reviewed quarterly		
Reserve for launches	5%	Extra spend on new listings and open houses		

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

- [ ] One CRM holding every past client, sphere contact and lead
- [ ] Required lead source field on every new contact
- [ ] Instant lead alerts and a call-first response rule
- [ ] Consent language on every form before texting
- [ ] Do Not Call scrub before any cold calling
- [ ] Google Business Profile with reviews from recent clients
- [ ] Website with a home-value page and a buyer agreement explainer
- [ ] Neighborhood pages for each area you serve
- [ ] Listing presentation marketing package
- [ ] Meta campaigns set up in the housing special ad category
- [ ] UTM-tagged links and tracking numbers on ads and signs
- [ ] Monthly report of closed sides and commission income by source

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
New contacts added				
Sphere touches completed				
Median lead response time				
Appointments set				
Buyer agreements signed				
Listing appointments and listings taken				
Pending and closed sides				
Cost per closed side by source				

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	Snapshot, personas, positioning; label last year's closings by source; consolidate the CRM		☐
Month 2	Touch plan for past clients and sphere; review requests; website home-value page and buyer agreement explainer		☐
Month 3	Lead routing and response rules; listing presentation marketing package		☐
Month 4	Weekly neighborhood video series; first paid tests on seller terms and Meta housing category		☐
Month 5	Monthly market report email; spring listing push		☐
Month 6	Mid-year review of cost per closed side by source; client appreciation event		☐
Month 7	New neighborhood pages for SEO; Spanish-language content where relevant		☐
Month 8	Relocation and back-to-school content; partner outreach to lenders and builders		☐
Month 9	Fall listing campaign; home anniversary notes to past clients		☐
Month 10	Annual home-value review mailing to past clients and farm		☐
Month 11	Holiday client event or gift drop; ask for referrals		☐
Month 12	Annual review; set next year's goals and budget from closed-side data		☐

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 Buying leads with no follow-up system

Call within minutes and keep a months-long nurture for every lead you pay for.

- [ ] We do this today

02 Treating the sphere like a mailing list

Pair the monthly email with personal calls, notes and annual home reviews.

- [ ] We do this today

03 Posting only listings

Build neighborhood, market and process content so you always have something to say.

- [ ] We do this today

04 Fair housing risk in targeting or wording

Use the platforms' housing categories and describe properties, not people.

- [ ] We do this today

05 Winging the buyer consultation

Write down your value statement and how you explain compensation, and rehearse it.

- [ ] We do this today

06 Measuring leads instead of closed sides

Judge every channel by commission income and cost per closed side.

- [ ] 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**	Fill in the snapshot, personas and positioning; label last year's closings by source.
☐	**Week 2**	Consolidate your database into one CRM and give each group a touch plan.
☐	**Week 3**	Complete your Google Business Profile, ask 20 past clients for reviews, add a home-value page.
☐	**Week 4**	Set up lead alerts, a call-first rule and consent-based text follow-up.
☐	**Month 2**	Build the listing presentation package and start a weekly neighborhood video.
☐	**Month 3**	Test Google Search on seller terms and Meta in the housing category, with tracking.
☐	**Quarter 2**	Launch a monthly market report email and hold a client appreciation event.
☐	**Year 1**	Compare cost per closed side by source and move budget to what closes.

NOTES

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

MaaS by CodeSM is the outsourced marketing team for real estate agents, teams and small brokerages. 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



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