

Real Estate Marketing Plan Worksheet

Six fill-in sections plus a worked example. Complete in under an hour.

1. Goals one number, this quarter

Primary goal (listings, leads, or appointments):

Supporting goal 1:

Supporting goal 2:

2. Target audience segment, geography, price range

Who is most likely to hire you this quarter, where, and why:

3. Budget 8 to 12% of quarterly GCI target

Total quarterly budget:

Paid media (approx. 50%):

Content production (approx. 30%):

Tools (approx. 20%):

4. Channel mix 2 to 3 channels, not six

Channel 1 / weekly action / monthly budget:

Channel 2 / weekly action / monthly budget:

Channel 3 / weekly action / monthly budget:

5. Content calendar every deliverable gets a date + owner

Week 1 content (posts, emails, videos, ads):

Week 2 content (posts, emails, videos, ads):

Week 3 content (posts, emails, videos, ads):

Week 4 content (posts, emails, videos, ads):

6. KPIs review weekly

Leads in the pipeline

Cost per lead

Listing appointments booked

Lead-to-appointment conversion rate

Total pipeline value

30-day review notes:

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Worked example solo residential agent, Q3 2026

Goal

8 listing contracts in North Austin zip codes 78701-78702, Q3 2026.

Target audience

Sellers in 78701-78702, priced \$500K to \$750K, planning to list within 6 months.

Budget

\$7,200 over 90 days: \$3,600 paid / \$2,160 content / \$1,440 tools.

Channel mix

Google Local Service Ads + Instagram Reels + bi-weekly email to sphere of influence.

Content calendar

4 Reels per month (one per week), 2 emails per month, 1 listing video per new listing.

KPIs

Cost per lead target \$120. Appointments booked target 2 per week. Review at 30 days.

Use this example as a benchmark, not a target. Adjust numbers to your market and capacity.