

*market leader*<sup>®</sup>

# 2023 Real Estate Marketing Plan

Your Path To Getting More Leads  
Than Ever Before



# Good Agents Have Good Plans

**Are top-performing real estate agents lucky?** Maybe sometimes. But not in the conventional sense of the word. If there's any "luck" involved in their success, it only comes as a result of putting a fail-proof system in place that creates opportunities to strike gold. Again and again.

It's never the cheap luck that comes from playing the lottery or tossing a penny into the wishing well. No, the truly "lucky" real estate agents are the ones who know how to develop and implement an effective plan.

And the best place to begin is with a well-crafted marketing plan. The success of your business depends on it. That's what this interactive guide is all about.

Not only does it equip you with the useful tools, helpful questions, and note-taking space you need to take inventory of your business, it will also walk you through the process of building your brand, setting attainable goals, and creating for yourself an actionable plan that leads to success.

**The work you do here is important.** It will set you up to expand your reach and accomplish more, not just for 2023 but for years to come.



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# The Marketing Plan Checklist

There's no such thing as a dumb question here. So let's start with this: What is a real estate marketing plan? A real estate marketing plan is an organized collection of strategies, systems, and schedules that agents, teams, and brokerages use to guide their marketing efforts.

Every marketing plan must incorporate the five essential components listed below. Don't worry. This is only meant to help you take inventory. We'll take a closer look at each component as we go. Which (if any) do you already have in place? Check those that apply:

## Brand Structure

Your brand identity guides all of your marketing efforts. It answers all of your big who-what-where-why-and-how questions.

If you have a weak brand, you're more likely to lose focus, disappear in the crowd of competition, and misrepresent who you are as an agent. All of which reduces productivity and hinders your ability to acquire and retain quality leads.

## Data & Analytics

Put simply, data makes marketing easier. If branding provides a sense of direction from the 30,000-foot range, it's data that provides the ground-level assistance so you can make informed strategy decisions. Plus, when you're armed with statistics, analytics, and insights, you're better able to set goals, track progress, and make your success repeatable.

## An Understanding of Consumers' Expectations

The bar is high. Consumers expect quick turnarounds and above-and-beyond customer service. And today's consumer is more informed than ever. They have almost instant and unlimited access to all of the information and answers they're looking for. Search engines and real estate portals are designed to provide it all. Sometimes that means they expect the same from their real estate agent.

## Social Proof

Consumers want authentic proof before they commit to a brand. But they don't want the proof to come only from the brand itself – they want to hear from users, clients, and anyone else who has actually experienced the product, good, or service.

They want social proof: testimonials, reviews, and influencers' perspectives.

## Technology & Tools

Real estate technology is crucial. So crucial that you almost can't do customer relationship management, direct marketing, or any of your transaction work without it. The best real estate marketing plans include a social media strategy, video content, robust marketing automation tools, a website, and a fully-integrated CRM.



# Build Your Brand

## Define Your Value Proposition

A unique value proposition (UVP) is a statement that informs prospective clients about what sets **your brand** apart from that of the other agents in your market. Think of it as an elevator pitch, but in writing. It's what shows you're not a dime-a-dozen agent.

Be concise. It should be punchy so that it's as memorable and clear as possible. Most UVPs are only a sentence or two in length.

Use numbers whenever possible. Stats and figures give prospects something to hold on to. Plus, they go a long way in boosting perceived credibility.

### Example UVPs:

"I have helped more clients sell their Seattle homes in the last five years than any other agent. My client's homes sell in an average of just 20 days, 25 percent faster than the average for my area."

"My clients love the four C's of my Worry-Free Guarantee: customer care, communication, and closings. As a veteran myself, I have a first-hand understanding of what my clients need and I know what it looks like to provide service that satisfies."

**Add your personal value proposition here:**

# Cast a Vision Statement

**Think big.** A vision statement is concerned with where you see your business fitting into the bigger picture. It's a future-oriented declaration of your grandest objectives and beliefs. And it describes what the world would look like if your wishes came true. In other words, it's both aspirational and inspirational.

A vision statement differs from a mission statement in that it has broader scope. It might be helpful to think of it this way: Vision emphasizes the "what," whereas mission emphasizes "how."

So have fun with this! It's okay to suspend reality for a moment and take your eyes off of the practical stuff so you can daydream on purpose. It's time to cast your vision.

## Example vision statements:

**Keller Williams:** "To be the real estate company of choice for agents and their customers."

**Warby Parker:** "We believe that buying glasses should be easy and fun. It should leave you happy and good-looking, with money in your pocket. We also believe that everyone has the right to see."

**Coca-Cola:** "Our vision is to craft the brands and choice of drinks that people love, to refresh them in body and spirit. And done in ways that create a more sustainable business and better shared future that makes a difference in people's lives, communities and our planet."

**Add your vision statement here:**

# Craft a Mission Statement

Your mission statement brings it all together. It shows how your UVP relates to your vision statement. It explains what you do, who you serve, how you're different, and why you do what you do.

A well-crafted mission statement serves two very important functions. First, it keeps you focused on your priorities, your overarching purpose, and the meaningfulness of your work. And second, it tells your prospects and clients exactly what they can expect when they work with you.

But remember: beyond the basics, there are no hard-and-fast rules. It's meant to serve you and your business, so there's no need to get caught up in deciding between "right" and "wrong" mission statements. It doesn't need to be comprehensive, overly specific and detailed, or even a complete sentence.

## Example mission statements:

**TED:** "Spread Ideas"

**RE/MAX:** "To be the worldwide real estate leader, achieving our goals by helping others achieve theirs. Everybody wins."

**Atlassian:** "From medicine and space travel, to disaster response and pizza deliveries, our products help teams all over the planet advance humanity through the power of software. Our mission is to help unleash the potential of every team."

Add your mission statement here:

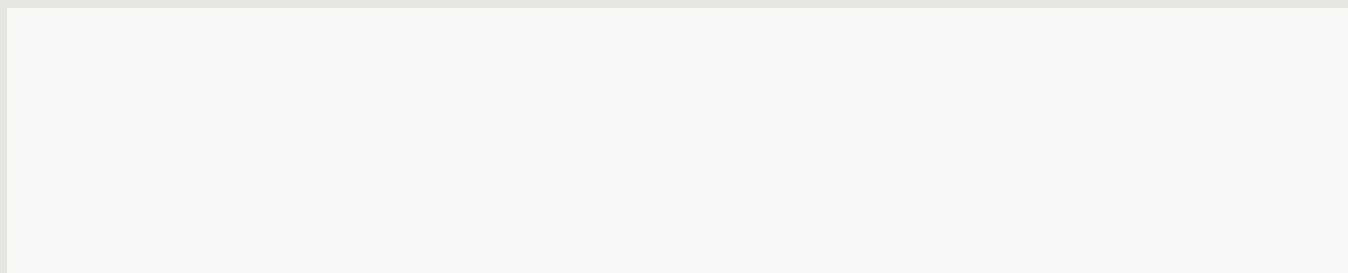
## Establish Your Target Market

You can't be everything to everyone. If you try, your brand will end up blending in instead of standing out. So take the time to identify who fits within your audience.

For you, that may include a certain part of town, a set of specific neighborhoods, or a niched type of consumer, such as veterans or home investors. If you want to get as specific as possible, consider creating profiles (or "[personas](#)") based on your top two or three ideal clients.

Let data be your guide. For example, if you're interested in a particular neighborhood, get all of the information you can find about the demographics in that area. Learn about who follows you on social media. Get a [customizable website](#) that allows you to collect and analyze data about your users and their activity on your site.

**Over to you: What does your audience look like?**



## Marketing Audit Worksheet

No matter how long you've been in business, it's always helpful to take a good honest look in the mirror from time to time in order to assess the health of your brand's marketing efforts. The Marketing Plan Checklist was a good start. Now it's time to go deeper.

The Marketing Audit Worksheet on the next page serves a twofold purpose:

- To help you take stock of the marketing tools you currently use
- To help you identify which marketing tools you need to use more often

Instructions:

1. Look through each of the tools listed in the first column. If you need to, use the blank rows at the bottom to add any tools you use that aren't listed.
2. Taking your time to think through where you're at with each tool, fill out the third and fourth columns for each row with a rating.
3. Read through the "Questions to Consider" section and use the space provided to note any thoughts, strategies, or action items that you want to remember for later.



# Marketing Audit Worksheet

Marketing Tool	Importance Rating	Frequency of Use	Effectiveness Rating
Common marketing tools used by today's agents:	<ul style="list-style-type: none"> <li><span style="color: orange;">■</span> Essential</li> <li><span style="color: green;">■</span> Important, but not essential</li> <li><span style="color: blue;">■</span> Good to have</li> </ul>	<p>How often do you use this marketing tool?</p> <p>0 = Never; I don't have this tool                      1 = Rarely                      2 = Sometimes                      3 = Frequently</p>	<p>How effective was this tool in terms of acquiring and converting leads in the last 12 months?</p> <p>0 = N/A; Unsure                      1 = Not at all effective                      2 = Somewhat effective                      3 = Very effective</p>
<b>Email Marketing</b> (Newsletters, drip campaigns, etc.)	<b>ESSENTIAL</b>		
<b>Website</b> (Including MLS Listings and a blog)	<b>ESSENTIAL</b>		
<b>CRM Platform</b>	<b>ESSENTIAL</b>		
<b>Print and Direct Mail</b> (Print newsletters, postcards, flyers, etc.)	<b>IMPORTANT</b>		
<b>Paid Advertising</b> (Online ad buys, radio, etc.)	<b>IMPORTANT</b>		
<b>Social Media</b> (Facebook, Instagram, and LinkedIn)	<b>GOOD TO HAVE</b>		

## Download This Template

You've got options. Fill out the Marketing Audit Worksheet right here in this guide, or you can download the spreadsheet version by clicking one of the buttons below.

Excel

Google

## Questions to Consider:

Are you using all of the “essential” marketing tools to their fullest potential?

Which (if any) of the “good to have” tools would you like to add to your arsenal in 2023?

Notice how the ratings in the third column compare to your ratings in the fourth column, which best describes your situation?

✓ **Are you seeing low ratings in both columns?**

Don't worry about it. That's why this guide exists! You've already downloaded this guide, which is a massive step toward improvement. Things are only going to get better from here.

✓ **Are you seeing high numbers in the third column and low numbers in the fourth?**

You've got all of the tools you need, and you use them frequently. Great job! Now it's time to investigate the ways you can turn them into lead-converting machines that maximize growth.

✓ **Seeing low numbers in the third column but high numbers in the fourth?**

The few tools you have are producing positive results. That's a great start. But by leveraging more marketing tools and adding more ways to get in front of your audience, your business could see even more growth this year.

✓ **Seeing mediocre numbers in both columns?**

You're definitely not in a bad place. But you didn't set out to be a “mediocre” agent, right? So maybe 2023 is the year when you make some changes, by adding more tools to your marketing plan, maximizing the effectiveness of the tools you already have, or both.

✓ **Seeing high numbers in both columns?**

Congratulations! Of course, there's always more work to be done, but you're on the right track. Now it's time to develop a solid marketing plan that will put your successes on repeat.



# SWOT Analysis

## Strengths, Weaknesses, Opportunities, and Threats

Real estate marketing plans are never one-size-fits-all. Sure, there may be some objectively effective strategies that benefit all agents. But the way those strategies find implementation must be unique to you and your situation. Only you can be the one to determine what's best for your business.

Like the brand identity questions and the marketing audit worksheet, a SWOT analysis is yet another useful “self-discovery” tool that helps you take inventory. Combining the insights you’ve already discovered with the findings you’re about to uncover with this SWOT analysis will put you in the perfect position to set goals for the year.

### Example SWOT Analysis:

STRENGTHS	WEAKNESSES
<p>Live in a desirable community with high median home price</p> <p>Well-respected and a fixture in the community</p> <p>Connections with a good lender</p> <p>Expert on condominium association rules</p> <p>Fluent in Mandarin Chinese</p>	<p>Substantial economic uncertainty in local area</p> <p>Lousy computer skills and understanding of real estate technology</p> <p>Limited savings</p> <p>Limited budget for marketing</p> <p>Poor Spanish skills, but there are many Spanish-speaking people in my market</p>
OPPORTUNITIES	THREATS
<p>Local area is gentrifying</p> <p>Local community magazine is offering me a deal on advertising</p> <p>New factory opening in the area, attracting many jobs</p>	<p>Interest rates are on the rise</p> <p>Overpriced stock market could implode</p> <p>Major storms in the area have been known to impact housing demand</p> <p>Cash flow problems could possibly force me out of the business if I go more than a couple of months without closing a deal</p>

## Your SWOT Analysis Worksheet:

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

## Make It Yours

The SWOT analysis worksheet above is editable. But if you'd prefer to download Excel or Google Sheet versions to have more room, click on the below buttons.

[Excel](#)[Google](#)

# Set SMART Goals

**Every goal you create—whether it’s personal or professional—should be SMART:**

**Specific. Measurable. Attainable. Relevant. Time-Bound.** There’s no wonder why business professionals hear so often about the importance of this goal-setting strategy. It’s more than a memorable acronym, as helpful as that is. It enables you to set realistic goals while also increasing the likelihood that you’ll achieve them.

**Every SMART goal must have the following characteristics:**

**Specific.** Be as specific as possible when establishing your goals, both in terms of identifying the objective and in identifying the quantifiable goal. For example: “I will increase my gross commission income by 25 percent next year.”

**Measurable.** If it can’t be measured, it can’t be managed. If it can’t be managed, it can’t be improved or repeated. Incorporating quantifiable metrics into your goals – like leads generated or deals closed – will help you determine whether you accomplished them, and to what degree. The goal to “generate a lot of leads in 2023” is hardly measurable. But the goal to “generate at least 100 leads per month throughout 2023” makes it easy to measure whether you succeeded.

**Attainable.** Failing to hit goals is demoralizing. So it’s important to set reachable goals so that you can avoid crushing your confidence. The key is to strike a balance between attainable and challenging, so that by pushing yourself and working hard you are still able to succeed.

**Relevant.** Set goals that are aligned with your business plan, not anyone else’s. And set goals that are directly related to productivity, profitability, and your core functions. For example, goals for real estate agents should relate to key performance indicators like deals closed, leads generated, and new clients found.

**Time-Bound.** You can have the best specific, measurable, attainable, and relevant goals ever, but if time is unlimited, there’s nothing to prevent you from procrastinating or stagnating.

Deadlines give you a much-needed sense of structure and progression. At times, they have the added bonus of creating a sense of urgency so that you can be as productive and efficient as possible.

## Example SMART Goals:

- ✓ “I will increase the average number of leads I generate every month by 20 percent by the end of 2023.”
- ✓ “I will attend one webinar or download one guide about lead generation best practices every month throughout 2023.”
- ✓ “I will 1) research which real estate website provider has the best websites for generating leads and 2) implement a new website from that provider by the end of the first quarter.”
- ✓ “By the end of the second quarter, I will create a new referral reward program and alert past clients about it.”





## 2. Develop a Strategy for Referrals

Imagine if every one of your clients referred someone to you every year. The success would be compounding! So as you're developing a marketing plan for this year, it's important to include a referral strategy.



- **Determine exactly when and how you'll ask your clients for referrals.** You should have a system in place that enables you to reach out automatically and regularly to keep your name top-of-mind with people in your sphere of influence.
- **Partner with local vendors so you can refer business to each other.** One way to open up the conversation is to ask the owners of your favorite local businesses if they'd be willing to allow you to display some marketing materials and business cards at their spot. Tell them that, in return, you'll refer your clients to their business, feature them on your website, or that you'll include them in your client "welcome packet" full of your best recommendations and local favorites.
- **Consider offering your clients some kind of a referral incentive.** For example, maybe you set up a VIP program where they can earn points toward a discount off of your commission for their next real estate transaction.

## 3. Use Marketing Automation Tools

If only you could clone yourself! Then maybe you could manage all of the details of your marketing operations while still adding the all-important personal touch onto each interaction you have with your prospects, leads, and clients.

Well, you can't clone yourself. But with the [best marketing automation tools](#), you can do just about everything else on your list. With [Market Leader Professional](#), for example, you get a customizable, lead-generating website, a fully-integrated CRM, and the ability to automate campaigns, newsletters, and content pieces like postcards, flyers, and video-enabled mobile-responsive emails.

## 4. Leverage the Power of Social Media

Leveraging the power of social media may be among the simplest and most effective ways to generate leads.

The goal of successful marketing in general is to deliver the right messages to the right audience, in the right place and at the right time. And social media presents the perfect opportunity to do all of that. [Click here](#) to learn how you can use the top six social media platforms to generate leads.






Pro Tip: Try to adhere to the 80/20 rule: 80 percent of your content and posts should offer your audience value, insights, or entertainment, and the remaining 20 percent should promote your business.

**This ratio serves two purposes.**

1. It keeps your audience engaged and interested in what you have to say. (No one wants to get blasted with constant “updates” and “exclusive offers” from a sales shark.)
2. When you do share promotional content, your followers will be more receptive. Your sparse marketing-heavy posts will be more impactful because they’ll stand out.

# Marketing Channel Cheat Sheet

To give you a shortcut for implementing an efficient and productive social media strategy, here’s a handy cheat sheet:

CHANNEL:	AUDIENCE:	STONE:	WHAT THEY WANT:
 Facebook	<ul style="list-style-type: none"> <li>• Leads, clients, past clients</li> <li>• Broad audience that includes those closest to you as well as those in your extended network</li> </ul>	<ul style="list-style-type: none"> <li>• Warm, friendly</li> <li>• Conversational</li> <li>• Casual</li> <li>• Personal</li> </ul>	<ul style="list-style-type: none"> <li>• News</li> <li>• Insights</li> <li>• Entertainment</li> <li>• Inspiration</li> </ul>
 Instagram	<ul style="list-style-type: none"> <li>• Leads, clients, past clients</li> <li>• Broad audience that includes those closest to you as well as those in your extended network</li> </ul>	<ul style="list-style-type: none"> <li>• Warm, friendly</li> <li>• Conversational</li> <li>• Casual</li> <li>• Personal</li> <li>• Engaging, fun, humorous</li> </ul>	<ul style="list-style-type: none"> <li>• Community information</li> <li>• Real estate information</li> <li>• High-quality visuals</li> <li>• Think: educate, entertain, and inspire</li> </ul>
 LinkedIn	<ul style="list-style-type: none"> <li>• Business professionals in your network</li> <li>• Colleagues</li> <li>• People you do business with</li> </ul>	<ul style="list-style-type: none"> <li>• Authoritative</li> <li>• Informative</li> <li>• Serious</li> <li>• Straightforward</li> </ul>	<ul style="list-style-type: none"> <li>• Networking opportunities</li> <li>• News</li> <li>• Insights</li> <li>• Advice</li> </ul>
 Twitter	<ul style="list-style-type: none"> <li>• Leads, clients, past clients</li> <li>• Broad audience</li> <li>• People who are especially interested in your thoughts and what you have to say</li> </ul>	<ul style="list-style-type: none"> <li>• Conversational</li> <li>• Casual</li> <li>• Personal</li> <li>• Quippy, witty</li> </ul>	<ul style="list-style-type: none"> <li>• Conversation and thought-sharing</li> <li>• Updates &amp; breaking news</li> <li>• Insights</li> <li>• Advice and opinions</li> <li>• Shareable content</li> </ul>
 Email	<ul style="list-style-type: none"> <li>• Your narrowest, most exclusive audience</li> <li>• Those who opted in to receive your emails/newsletters</li> <li>• Highly-engaged leads, clients, and past clients</li> </ul>	<ul style="list-style-type: none"> <li>• Warm, friendly</li> <li>• Personal</li> <li>• Helpful: informative, knowledgeable, service-oriented</li> </ul>	<ul style="list-style-type: none"> <li>• Information for their specific market/situation</li> <li>• Real estate news</li> <li>• Guidance, advice, insights</li> <li>• Personalized messages/content</li> </ul>



# Your Digital Marketing Toolkit

## Canva

Canva makes original design simple. You can create designs for web or print: Facebook covers, flyers, blog graphics, invitations, and more.

Cost: Canva offers a free version, but a full access account is only \$12 per month.

## feedly

Feedly is an easy-to-use news and article aggregator that allows you to stay on top of industry news by creating your own customized feed, that you can then share with your networks on various channels.

Some great sources to follow: Real Trends, Inman News, NAR, Zillow Porchlight, RISmedia

Cost: free.

## pixabay

Pixabay is a marketplace that offers royalty-free stock photos and videos that you can use freely, in any of your marketing communications. These can be used for blog articles, social media campaigns, and anywhere else you might need some visuals to supplement your efforts.

Cost: free.

## Google Analytics

Google Analytics allows you to look into specific search terms and see how popular they have been over time. You can see search volumes for “real estate agents in south florida” in any language, during any given date range. Use Google Trends to identify keywords and trends to go after in your marketing plan this year.

Cost: free.

## bitly

Bitly is a URL shortener and link management platform that allows you to customize links, while tracking how many clicks they get and where they come from. This is helpful in tracking the ROI of time spent posting links on various channels.

Cost: free.

## Hootsuite®

A social media management tool that allows you to schedule and post updates to Twitter, Hootsuite is most useful for social listening and engaging with current and prospective audiences through the customized dashboards: you can follow and monitor hashtags, new followers (great for engaging your new connections!), and keep a close eye on your mentions.

Cost: free to manage first three profiles, \$19 for their Professional account which covers 10 profiles, post analytics, and unlimited scheduling.

# Create Your Marketing Plan

This is where your good ideas become commitments. You took inventory with the audit and the SWOT analysis. You picked up some strategies and tools to improve your weaknesses, optimize future performance, and reach your goals. And now you're ready to put it all together to create a plan.

## Instructions for each of your SMART goals:

1. Write a goal in the first column.
2. List the strategies you'll use to reach the goal in the second column.
3. The third column is where you get as specific as possible. Write out exactly what you plan to do for each step of the strategy (i.e., which tactics you'll use). Be sure to include dates and a timeline.
4. Use column four to steer your next steps. Track your progress, note important observations about your tactics, and give yourself a roadmap for success with practical action items.
5. Set another goal and repeat the process.

SMART GOAL	STRATEGIES	TACTICS	TAKEAWAYS/NEXT STEPS
What will you accomplish? When?	How will you reach your goal?	What actions will you take to effect change? When?	What have you noticed about your goal, strategies, and tactics? What now?

## Get More Space – Download a Template!

Feel free to use the space provided above. But if you need more room, you can download Excel and Google Sheets versions of our marketing plan template by clicking the buttons below.

[Excel](#)[Google](#)

# About Market Leader

A leader in real estate technology since 1999, Market Leader proudly serves hundreds of thousands of agents and teams across the United States and Canada. You can build and manage your business, lead-to-close, with our products:

## Market Leader Professional

One intuitive system for agents and teams to generate and convert leads. It includes an end-to-end customer relationship management system, customizable IDX website, and a fully-integrated marketing design center.

[Learn More](#)

## Real Estate Leads

We wrote the book on generating leads. Get a guaranteed number of buyer and seller leads – not just impressions – delivered directly to your CRM. These leads are **exclusive** – not shared with other agents. Lead inventory is limited, so check availability today.

[Learn More](#)