Zillow PREMIER AGENT™

Real Estate Marketing Plan

A business without a marketing plan is a ship without a compass, rudder or flag: nobody knows who it is, where it's going or why it even set sail.

A good marketing plan can set you up for success, identifying the right tools and messages to effectively reach your audience, better service your clients and differentiate yourself from the competition.

Use our customizable template and create a roadmap to your most successful year yet! Determine your business goals, identify your customers and competition, outline a plan for generating leads, and more.

To populate the template, simply place your cursor in a highlighted field and enter the information. After you populate your template, save it to your laptop. Remember that your marketing plan is a living document and you should expect to revisit and update it regularly.

Vision

What, specifically, do we want our business to achieve or accomplish in the midterm and long-term?

Example: We intend to provide _____ [target customers] with _____ [service] that makes them feel _____ [emotion] and _____ [emotion] in working with us, not only during the home _____ [buying/selling] process, but beyond closing, too, so that they can't wait to tell their friends and families about us.

Example: Our company will change the way _____ [target customers] think about real estate. How we provide _____ [service], _____ [service] and _____ [service] will leave them thinking our way is how every real estate company should do home _____ [buying/selling].

What is our vision?

Our team

Name	Function

Target customer

Who, specifically, is our target customer?

☐ First-time home buyers

☐ Home sellers

☐ Renters

☐ Other (e.g., relocations, retirees, investment properties, etc.)

What is our target customer's story?

Question	Answer	Our strategy
Where do they want to live?		
What is their age?		
What is their annual household income?		
What is the household makeup?		
What do they want from their home?		
What are their feelings and concerns about searching for and purchasing their home?		

What do we want our target customer to think after receiving the marketing messages we send through our various methods (ads, corporate website, social media, etc.)?

Example: After receiving our message, we want target customers to believe that our company is available 24/7 with the people and knowledge to guide them quickly and painlessly through the home buying or selling process.

What do we want our target customer to think after receiving our message?

What exactly do we want our target customer to do?

Example: We want our target customer to call or email our office and schedule an appointment with one of our agents.

What exactly do we want our target customer to do?

Goals

Business goals: What does success look like for the business?

Example: Close $2 million in sales for the year.

Goals

Strategic goals: What are our strategies for achieving our business goals?

EXAMPLE	Goal	Strategy
	Close $2 million in sales for the year.	Be recognized as one of top 10 real estate agents for home sellers in the county.

Goal	Strategy

Tactical goals: What actions do we take to implement our strategies?

EXAMPLE	Strategy	Tactic
	Be recognized as one of top 10 real estate agents for home sellers in the county.	Post 10 customer reviews per month to our Zillow Group profile page and corporate website.

Strategy	Tactic

Unique selling proposition (USP)

What do we offer that no one else does?

EXAMPLE	**For**	home buyer clients	(target customer)
	Who need	to find and purchase their first home	(the problem/challenge we solve)
	[Our Company]'s	personally guided process	(product/solution)
	Provides	quick and painless home purchases	(quantified benefits)
	At	5 percent commission	(explicit price)
	Unlike	XYZ Real Estate Inc.	(our competition)
	We do this by	combining our extensive knowledge of the market with a deep understanding of our clients' needs and concerns	(how do we do it)
	As demonstrated by	the consistently high number of listings and referrals we receive.	(proof points)

For		(target customer)
Who need		(the problem/challenge we solve)
[Our Company]'s		(product/solution)
Provides		(quantified benefits)
At		(explicit price)
Unlike		(our competition)
We do this by		(how do we do it)
As demonstrated by		(proof points)

How do we specifically differentiate ourselves from our competition? How do we know if it's working?

	Differentiator	How we do it	We know it's working because ...
EXAMPLE	First-time home buyer expertise	Our top three buyer agents have 60+ years combined experience with first-time home buyers.	Last year, 18 percent of our first-time home buyer clients indicated they had spoken with another company before signing with us.

Differentiator	How we do it	We know it's working because ...

What steps do we take to maintain that differentiation?

	Differentiator	How to maintain it
EXAMPLE	First-time home buyer expertise	• Keep at least three agents with this expertise on staff • Ongoing education • Use in our marketing messages

Differentiator	How to maintain it

SWOT analysis

What are our strengths, weaknesses, opportunities and threats?

	Strengths	Weaknesses	Opportunities	Threats
EXAMPLE	Solid understanding of challenges facing first-time home buyers.	Overstaffed	Raise brand awareness among first-time home buyers.	Cash flow could force us to reduce staff.

Strengths	Weaknesses	Opportunities	Threats

How will we leverage our strengths, overcome weaknesses, seize opportunities and eliminate threats?

	Strengths	How to leverage
EXAMPLE	Solid understanding of challenges facing first-time home buyers	• Develop a guide on "Things to Consider When Buying Your First Home" • Offer a seminar for first-time home buyers • Develop plan to capture attendee information • Advertise seminar on blog and social media • Hold seminar as soon as possible

Strengths	How to leverage

Weaknesses	How to overcome

Opportunities	How to seize

Threats	How to eliminate

Competitive analysis

Who is our primary competition for this market and why? How will we address the challenges?

	Competitor	Strengths	Weaknesses
EXAMPLE	XYZ Real Estate Inc	• 13 years in operation • Multiple buyer and seller agents and licensed assistants	• Focus on luxury homes • Crowded website with hard-to-find contact information

Competitor	Strengths	Weaknesses

What is our plan to capitalize on our competitors' weaknesses?

	Competitor	Weakness	How to overcome
EXAMPLE	XYZ Real Estate Inc	Focus on luxury homes	• We will include low- to mid-range homes in our listings • We will publish how-to blog articles on spotting diamonds in the rough, determining how much home you need, and calculating mortgages • We will hold a seminar on finding the right home

Competitor	Weakness	How to overcome

Marketing materials

What marketing materials and methods do we use to reach our target audience?

	Resource	Key features	Notes	Budget
EXAMPLE	Website (our own)	Listings with at least five photos each, blog articles, reviews, white papers, MLS and IDX feeds	Refresh content monthly	$1,000

Resource	Key features	Notes	Budget
Website (our own)			
Social media			
Website:			
Website:			
Website:			
Website:			
Online advertising on a related site (e.g., Zillow)			
Email drip campaigns			
Newspaper ads			
Direct mail postcards			
Signage			
Regular blog or contributor to another writing platform			
Brochures			
Media kit			

Business cards			
Flyers			
Door hangers			
Giveaways			
Newsletter			
Holiday cards			
Video			

Marketing calendar

Who leads the creation and maintenance of our marketing calendar?

Marketing calendar lead

What are our marketing milestones?

Example: 50% increase in website traffic for the year 2019

Example: 33% increase in leads through online methods during each quarter of 2019

What are our marketing milestones?

Lead generation

What are our most effective methods of lead generation? What kind of return do we see from each?

Note: The return on leads generated through an online source is calculated using an online close rate, which ranges between 0.02–0.04 percent. In the example below, we use the low end of 0.025 percent for the close rate, 360 for the leads generated in a year, $250,000 for an average selling price, and 0.03 percent for an average commission rate.

Return = [(# of Leads in a Year x Conversion Rate) x (Average Selling Price)] x Average Commission

`Example: [(360 x 0.025) x $250,000] x 0.03 = $67,500`

Tactic	Generates leads per year	Average close rate	Average selling price	Average commission	Return
Website					
Advertising, print					
Publication:					
Publication:					
Advertising, online					
Resource:					
Resource:					
Online pay-per-click					
Advertising, broadcast					
TV					
Local radio					
Monthly bulletins					
Lender partnerships					
Referrals, personal					
Referrals, professional					
Reviews					

Farming					
Networking events, including conferences and tradeshows					

Lead conversion

What is our primary method of converting leads into clients?

Example: We will invite leads to our offices for a meet-and-greet/informational meeting, and use it to schedule showings [home buyer leads] or a listing presentation [home seller leads]. We will follow up within 24 hours. We will invite them to our monthly "Real Estate Tips & Tricks" sessions.

What is our primary method of converting leads into clients?

What other methods do we use to convert leads?

Sales forecasts

What is the breakdown of our projected sales for this year and for the next three years?

Forecast	Year 1	Year 2	Year 3
Agent sales			
Broker sales			
Referrals			
Other			
Total sales			

Customer service

What is the "perfect world" delivery of our customer experience?

	Service	Measurement
EXAMPLE	Response time to incoming queries	Less than one minute regardless of whether it comes in by phone or email.

Service	Measurement
Response time to incoming queries	
Selecting listings for home buyer clients	
Scheduling showings for home buyer clients	
Following up with home buyer clients on homes they expressed interest in	
Listing presentations for seller clients	
Marketing homes for seller clients	
Paperwork completion and feedback	

Final closing tasks	
Post-sale follow-up: 1 month, 6 months, 1 year	
What loyalty reward do we offer repeat or referring clients?	

Measuring performance

Measuring the performance of your marketing efforts shows you where to focus your time and resources to meet your goals. If you track what works and what doesn't work, you can improve your strategies and tactics, and see even greater returns.

	Question	Measurement
EXAMPLE	What are our key marketing success metrics?	Increased website traffic and online lead generation

Question	Measurement
What are our key marketing success metrics?	
What will success look like for each?	
How will we measure our marketing performance?	
Who will determine if and how we will change our approach?	
How often will we measure our marketing performance?	
How shall we make our performance visible to the entire business?	
How will we evaluate our customer service? How often?	
How will we measure customer satisfaction?	