

Marketing for Real Estate Agents — Workbook

This workbook turns the course into a 90-day pipeline you build for one real farm. Work the sections in order: choose and analyze a farm and get found locally, stand up a Facebook and Instagram presence, plan and ship video, then build a referral engine, a market-report lead magnet, and a scorecard. Fill every worksheet and template with your own data, and leave every total, average, cost per lead, conversion rate, and ROI cell blank until you calculate it yourself.

Pick a Farm and Own It in Local Search

Choose a defensible farm using turnover and saturation, then make yourself findable with a Google Business Profile and hyperlocal pages.

Exercise: Analyze and choose your farm

Shortlist two or three candidate neighbourhoods and pull recent solds from your MLS for each. Use the numbers, not your gut, to pick one to commit to for the next 18 to 24 months.

- For each candidate area, how many total homes are there and how many sold in the last 12 months (turnover = sold divided by total)?

- Who are the top listing agents in each area and roughly what percentage of listings does the leader control (is any single agent above about 20 to 25%)?

- What is the average sale price, and at your typical commission rate, what is one side worth in gross commission?

- Which single area will you farm, and what is your target number of sides per year once it matures?

Worksheet: Farm definition and local foundation

Lock the decisions that everything else depends on. Write a single canonical name, phone, and area set you will reuse on every profile, page, and listing.

Chosen farm name and boundaries (streets / postal codes)

Approximate number of homes in the farm

Estimated annual turnover (homes sold last 12 months)

Average sale price and your commission rate

Canonical agent name as it will appear everywhere (e.g. Jordan Lee, Real Estate Agent)

Single business phone and website / landing page URL

Google Business Profile primary category and service areas to list

Top 1 to 3 neighbourhood pages to build first and their target keywords

Checklist: Found locally — foundation complete

-] Farm chosen using turnover and saturation math, not just preference
-] Google Business Profile claimed, category set to Real Estate Agent, and verified
-] 10 to 15 real photos added and a weekly Google Post scheduled
-] Canonical name, address, and phone (NAP) match exactly across profile and website
-] At least one neighbourhood page drafted with the location keyword in the title, H1, URL, and first paragraph
-] A market-report opt-in form is on every neighbourhood page and the site is submitted to Google Search Console

Farm Your Neighbourhood on Facebook and Instagram

Build agent profiles that convert, run a sustainable content calendar, and use a small geo-targeted ad budget aimed only at your farm.

Worksheet: Profile and positioning setup

Set up the accounts to generate leads, not just look nice. Write the exact bio and pinned post you will use. Instagram Business account handle and Facebook Page name

Bio / positioning line (the [neighbourhood] real estate expert ...)

Link tool and destination (Linktree or landing page with your market report)

Pinned post topic (your best monthly market update)

Scheduling tool you will use (Meta Business Suite / Later / Buffer)

Posting cadence committed to (days per week)

Primary call-to-action keyword for DMs (e.g. MOVE for a valuation, SOLD for the report)

Exercise: Plan two weeks of content with the 5-3-2 mix

Use the roughly 50% educate, 30% connect, 20% promote ratio. Draft ten posts so promotion never exceeds about one in five.

- List five educate posts (market update, buyer/seller tips, neighbourhood spotlight, mortgage or staging explainer)
 - List three connect posts (your story, behind the scenes, a client win with permission, a local business you love)
 - List two promote posts (a listing, an open house, a just-sold story) each with one clear call to action
 - For each post, what is the single next step you want (comment a word, DM a keyword, click the report link)?
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Checklist: Compliant, lead-focused ad launch

- Campaign built in Meta Ads Manager with objective Leads (instant form) or Engagement/Traffic for listing reach
- Special Ad Category for Housing acknowledged (no age, gender, or ZIP targeting)
- Targeting set by geography: a tight radius or pin on the farm
- Creative is a 15 to 30 second video or a clean image with one offer (Free [Neighbourhood] Home Report)
- Budget set to 5 to 10 dollars a day and committed to run at least 7 days before judging
- Instant-form or landing-page leads route to your CRM and you can respond within minutes

Win Attention and Listings With Video

Set up a simple repeatable video kit, script listing walkthroughs and neighbourhood tours, then distribute one shoot across every platform.

Checklist: Video kit and filming habit ready

- Smartphone set to 4K or 1080p; horizontal for listings, vertical for reels
- Gimbal (DJI OM / Osmo Mobile) and a clip-on or wireless mic acquired
- Editing app chosen (CapCut for reels, Descript for transcript editing)
- A recurring filming time blocked on the calendar to batch-shoot
- Every video opens with a 3-second hook and ends with one call to action plus your name and farm

Exercise: Script a listing walkthrough and a neighbourhood tour

Plan one of each before you shoot. Narrate benefits and lifestyle, not just features and square footage.

- Listing video: what is the hook (the single best feature you tease in the first seconds) and the room order you will walk?

- For three rooms, what is the benefit-led line (e.g. morning light floods this kitchen) rather than a feature?

- Neighbourhood tour: which 4 to 6 stops (coffee, park, schools, commute, typical prices) will you film, and what keyword should it rank for ([area] guide)?

- What is the one call to action and destination link for each video (market report or valuation page)?

Worksheet: One-shoot distribution plan

Map how a single filming session becomes content on every platform. Optimize each cut so it is found and points somewhere you can capture the viewer.

Source footage (listing address or neighbourhood)

Short vertical cut for Reels / TikTok / Shorts (length and hook)

Full cut for YouTube and website (title with location keyword)

Native Facebook upload caption

Thumbnail idea and on-screen call to action

Single destination link for all versions (report / valuation page)

YouTube playlist it belongs to (Home Tours / Neighbourhood Guides)

Referrals, Lead Magnets, and Measuring ROI

Stand up a past-client and referral engine, build the market-report lead magnet and its follow-up, and run a scorecard that compares every channel on cost per lead and ROI.

Worksheet: Referral engine setup

Treat your sphere as a database you nurture on a schedule. Define who is in it, how you rank them, and the monthly touches you commit to.

CRM or tool you will use (Follow Up Boss / kvCORE / HubSpot / spreadsheet)

Number of contacts in the database today

A / B / C scoring rule (A = raving fans who refer, etc.)

Monthly touch target (number of contacts, aim 33 to 50)

Your monthly value touch (market update, anniversary note, check-in call)

Closing-day ritual (gift, keys photo, thank-you)

Google review ask wording and your saved short review link

Exercise: Design your market-report lead magnet and follow-up

Build the capture-and-convert system. Speed and persistence matter more than the design of the page.

- What is the exact offer (monthly [neighbourhood] market report, home-valuation request) and the headline plus three benefit bullets on the landing page?
 - Which builder and form will you use, and how does the lead reach your CRM and get the report instantly?
 - What is your follow-up sequence over 7 to 14 days (call, text, emails) and can you hit a 5-minute first response?
 - What goes to non-responders long term (the monthly report list) so you stay top of mind until they are ready?
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Checklist: Pipeline scorecard live

- Lead source is logged on every single inquiry so attribution is real
- Each channel is tracked on leads and cost per lead (your time counted as cost)
- Conversion is tracked from leads to appointments to clients
- Closings and gross commission income are attributed back to each source
- A monthly review is scheduled to scale the winner, fix or cut the loser, and protect referrals
- A 90-day plan is written with one focus per month (foundation, then social/video, then referrals/optimization)

Your Action Plan

1. Analyze two or three areas with MLS solds and commit to one farm using turnover and saturation, then lock a single canonical name, phone, and service-area set
2. Claim and verify your Google Business Profile as a Real Estate Agent, add 10 to 15 photos, and schedule a weekly Google Post
3. Build your first neighbourhood page and a market-report opt-in, with the location keyword in the title, H1, URL, and first paragraph, then submit to Search Console
4. Set up an Instagram Business account and a Facebook Page positioned as the neighbourhood expert, with a market-report link and a pinned market update
5. Batch and schedule two weeks of content using the 5-3-2 mix, ending every post with one clear call to action
6. Launch a 5 to 10 dollar a day Meta lead-magnet ad under the Housing Special Ad Category, geo-targeted to the farm, and run it at least 7 days
7. Block a weekly filming time and ship one listing walkthrough and one neighbourhood tour, each pointing to your report or valuation page
8. Slice each shoot into short cuts for Reels/TikTok/Shorts and full cuts for YouTube and your site, optimized with location keywords
9. Load your sphere into a CRM, score it A/B/C, and start touching 33 to 50 contacts a month plus a Google review ask after every closing
10. Stand up the market-report landing page and a 5+ touch follow-up sequence, then run a monthly scorecard tracking cost per lead and ROI by channel

