



Marketing Campaign Checklist

 Show only Checklist

Display Style
Default 

Campaign Goals & Strategy

Defining objectives, target audience, and overall approach.

Define Overall Campaign Goal (e.g., Increase leads, Sell X properties)

Write something...

Target Number of Leads Generated

Enter a number...



Target Conversion Rate (e.g., Leads to Appointments)

Enter a number...

Primary Campaign Focus (Choose one)

- ☐ New Listings
- ☐ Buyer Representation
- ☐ Seller Representation
- ☐ Investment Properties

Campaign Start Date

Enter date...

Campaign End Date

Enter date...

Brief Description of Campaign Theme/Narrative

Write something...

Budget Allocation for Paid Advertising (in USD)

Enter a number...

Target Audience Research & Segmentation

Understanding your ideal client and tailoring messaging accordingly.

Describe your Ideal Client Persona (e.g., demographics, lifestyle, goals, pain points)

Write something...

Estimated Age Range of Target Clients (Lower Bound)

Enter a number...

Estimated Age Range of Target Clients (Upper Bound)

Enter a number...

Primary Geographic Focus (e.g., city, region, state)

- ☐ City
- ☐ Region
- ☐ State
- ☐ National

What are the client's primary motivations for buying property?

- ☐ Investment
- ☐ Relocation
- ☐ Upsizing
- ☐ Downsizing
- ☐ First-Time Homebuyer
- ☐ Vacation Home

What are the client's biggest concerns or challenges regarding real estate?

Write something...

Client's Preferred Communication Channel?

- ☐ Email
- ☐ Phone
- ☐ Social Media
- ☐ Text Message

Estimated Average Household Income of Target Audience

Enter a number...

Branding & Messaging

Ensuring consistent brand representation and compelling messaging.

Brand Voice Guidelines

Write something...

Key Messaging Points (Value Proposition)

Write something...

Primary Brand Colors

☐ Color 1

☐ Color 2

☐ Color 3

Font Size (Headline)

Enter a number...

Logo Files (Various Formats)

 Upload File

Target Keywords (Brand Focused)

- ☐ Luxury Real Estate
- ☐ Investment Property
- ☐ First-Time Home Buyer
- ☐ Coastal Living
- ☐ Modern Design

Brand Story (Brief Summary)

Write something...

Website & Landing Pages

Optimizing online presence and conversion paths.

Target Landing Page Conversion Rate (%)

Enter a number...

Landing Page URL Status

- ☐ Active
- ☐ Testing
- ☐ Inactive

Landing Page Headline Copy

Write something...

Landing Page Call to Action (CTA) Copy

Write something...

Landing Page Image(s) - Optimized for Speed

 Upload File

Landing Page Form Fields (e.g., Name, Email, Phone)

- ☐ First Name
- ☐ Last Name
- ☐ Email
- ☐ Phone Number
- ☐ Address
- ☐ City
- ☐ State
- ☐ Zip Code
- ☐ Preferred Communication Method

Mobile Responsiveness Testing Passed?

- ☐ Yes
- ☐ No

Page Load Speed (seconds)

Enter a number...

Content Creation & Distribution

Developing valuable content and sharing it across relevant channels.

Blog Post/Article Topic & Outline

Write something...

Property Photos/Videos - Initial Selection

 Upload File

Content Formats to Create (Select all that apply)

- ☐ Blog Posts
- ☐ Videos
- ☐ Infographics
- ☐ Social Media Graphics
- ☐ Email Newsletter
- ☐ Virtual Tours
- ☐ Case Studies

Keyword Research - Primary Keyword

Write something...

Content Brief for Copywriter/Videographer (if applicable)

Write something...

Content Creation Deadline

Enter date...

Number of Social Media Posts per Week

Enter a number...

Content Distribution Platform Priority (e.g. Facebook, LinkedIn, Instagram)

- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ YouTube
- ☐ TikTok
- ☐ Pinterest

Social Media Marketing

Leveraging social platforms to reach and engage potential clients.

Which Social Media Platforms will be utilized?

- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ TikTok
- ☐ YouTube
- ☐ Twitter (X)

Daily Post Frequency (per platform)

Enter a number...

Social Media Content Pillars (brief description of themes)

Write something...

Example Social Media Graphics/Templates

 Upload File

Primary Social Media Manager

- ☐ Internal Employee
- ☐ Freelancer
- ☐ Agency

Hashtag Research Keywords (Initial List)

Write something...

Planned Social Media Campaign Start Date

Enter date...

Social Media Content Calendar (Initial Outline - include dates, platform, post type)

Write something...

Email Marketing

Nurturing leads and driving action through targeted email campaigns.

Email Campaign Name

Write something...

Email Sequence Stage

- ☐ Welcome
- ☐ Property Showcase
- ☐ Mortgage Pre-Approval
- ☐ Follow-Up

Email Subject Line

Write something...

Email Body Copy

Write something...

Featured Image (Optional)

 Upload File

Number of Recipients (Estimate)

Enter a number...

Scheduled Send Date

Enter date...

Scheduled Send Time

Enter time...

Call to Action Buttons

- ☐ View Property Details
- ☐ Schedule a Showing
- ☐ Contact Agent
- ☐ Download Brochure

Paid Advertising (PPC)

Managing paid ad campaigns on platforms like Google Ads and social media.

Daily PPC Budget

Enter a number...

Campaign Goal (Lead Generation, Brand Awareness, Website Traffic)

- ☐ Lead Generation
- ☐ Brand Awareness
- ☐ Website Traffic

Targeted Keywords (comma separated)

Bidding Strategy (Manual CPC, Automated Bidding)

- ☐ Manual CPC
- ☐ Automated Bidding

Ad Copy Variations (at least 3)

Write something...

Number of Landing Page Variations (A/B Testing)

Enter a number...

Ad Platform (Google Ads, Facebook Ads, LinkedIn Ads)

- ☐ Google Ads
- ☐ Facebook Ads
- ☐ LinkedIn Ads

Campaign Start Date

Enter date...

Public Relations & Outreach

Building relationships with media and influencers.

Target Media Outlets (Initial List)

- ☐ Local Newspapers
- ☐ Real Estate Magazines
- ☐ Local TV/Radio Stations
- ☐ Online Real Estate Blogs
- ☐ Industry-Specific Publications

Press Release Draft - Initial Version

Write something...

Key Message Focus (For Pitch)

- ☐ New Development
- ☐ Market Trends/Analysis
- ☐ Community Impact
- ☐ Expert Advice/Tips
- ☐ Client Success Stories

Influencer Categories (To Research)

- ☐ Local Lifestyle Bloggers
- ☐ Home Staging Experts
- ☐ Mortgage Brokers
- ☐ Interior Designers
- ☐ Local Community Leaders

Personalized Pitch Notes (For Each Contact)

Write something...

Scheduled Pitch Date

Enter date...

Number of Media Contacts Pursued (Initial)

Enter a number...

Notes on Follow-up Communication (After Initial Pitch)

Write something...

Measurement & Analysis

Tracking campaign performance and making data-driven adjustments.

Website Traffic Increase (%)

Enter a number...

Lead Generation Volume

Enter a number...

Conversion Rate (Leads to Clients)

Enter a number...

Cost Per Lead (CPL)

Enter a number...

Return on Ad Spend (ROAS)

Enter a number...

Primary Metrics for Success

- ☐ Website Traffic
- ☐ Lead Generation
- ☐ Conversion Rate
- ☐ ROAS

Date of Last Campaign Performance Review

Enter date...

Summary of Key Findings from Performance Review

Write something...

Campaign Performance Report (PDF)

 Upload File