

FREE EDITION · STEP-BY-STEP GUIDE

The Ultimate 2027 Real Estate Agent

A seven-step framework for growing your real estate business in 2027: mindset, leads, listings, social media, transactions, AI tools, and a 12-month action calendar.

7 steps

12-month 2027 calendar

Free



LISTING PRESENTATION
Let's sell your
home with a plan.

Prepared for
The Martinez Family
2418 Willow Creek Drive, Riverside, CA

Avery Collins
Harbor & Pine Realty · (555) 014-2290



START HERE

Build a business that runs on systems, not luck

You don't need more tips. You need a simple plan they can repeat every week. This guide gives you that plan in seven steps, plus a month-by-month calendar for 2027.

Each step tells you what to do, why it matters, and how to start this week. You can use every step with tools you already have. Where AgentNexo makes a ready-to-edit template for the job, we'll mention it, but nothing in this guide requires you to buy anything.

The seven steps

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How to use this guide

1. Read it once, start to finish, in about 30 minutes.
2. Pick **one** action from each step and put it on your calendar for this week.
3. Come back to Step 7 at the start of every month and plan the month in 20 minutes.

This guide is a planning and marketing resource. It is not legal, tax, or financial advice. Always follow your brokerage's policies, your state's real estate rules, your MLS rules, and fair housing requirements.

STEP 1

Mindset and your 2027 plan

Treat your business like a business. That means a written goal, a weekly schedule you protect, and numbers you check.

1. Write your goal as a number, then work backward

Choose the number of closings you want in 2027. Then work backward using **your own** history, not someone else's averages:

Question	Your answer
How many closings do I want in 2027?	
Out of every 10 appointments I hold, how many become a closing?	
So how many appointments do I need this year? (closings ÷ that rate)	
How many conversations does it usually take me to book one appointment?	
So how many conversations do I need per week? (÷ the weeks you'll work)	

New agent with no history? Make a cautious guess, then replace it with real numbers after 90 days of tracking.

2. Protect three non-negotiable blocks every week

Lead generation

Same time, every workday.
Conversations first, before email.

Content

One batching session a week to plan and schedule posts.

Review

Friday, 20 minutes: check your numbers, plan next week.

3. Measure activities, not just results

Closings lag weeks or months behind the work. Track the things you control: conversations, follow-ups, appointments, and posts. If the activities are on target, keep going. If they aren't, fix those first.

IN THE COMPLETE EDITION

Goal worksheets, weekly routines, and a KPI tracker

The Complete Edition turns this step into fill-in worksheets, a sample weekly time-block schedule, a 90-day launch plan, and a KPI tracker table you can print or copy.

STEP 2

Lead generation that compounds

The best lead sources are the ones you'll actually work every week. Pick two primary channels and run them consistently before you add a third.

Five channels to choose from

- **Your sphere:** people who already know you. Call, text, or meet a few every day.
- **Past clients:** check in on a schedule so you're the agent they remember and refer.
- **Open houses:** meet buyers and neighbors face to face, then follow up within a day.
- **Content:** helpful local posts that keep you visible between conversations.
- **Partners:** lenders, inspectors, and local businesses who can introduce you.

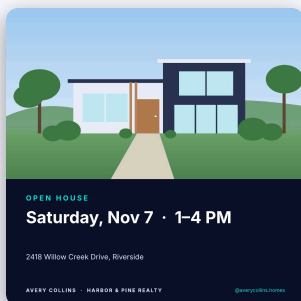
A simple daily rhythm

- ☐ Have a set number of real conversations (you choose the number in Step 1)
- ☐ Follow up with every new lead the same day
- ☐ Send one personal note, text, or video
- ☐ Add every new contact to your CRM or spreadsheet with a next-step date
- ☐ Log what you did, so Friday's review takes minutes

Follow-up is where most of the value is

Many leads aren't ready today. A steady, polite follow-up plan keeps you top of mind until they are. Start with this simple cadence for every new contact:

When	What to do
Same day	Reply personally. Answer their question and ask one about their timeline.
Day 2–3	Send something useful: a saved search, a home value range from your CMA, or a neighborhood tip.
Week 2	Check in by phone or text. Offer a short meeting or call.
Monthly	Add them to your newsletter or monthly market update, plus a personal check-in.



WANT IT DONE FOR YOU?

AgentNexo Real Estate Social Media Kit

Open House, Market Update, and Agent Brand posts (with captions) help you start conversations with your sphere, and the 2027 content calendar tells you what to post each week.

STEP 3

Listing presentations that win the room

Sellers want three answers: what is my home worth, how will you sell it, and what happens between offer and closing? Build your presentation around those questions.

A presentation in four parts

Part	What to cover
1. You	A short welcome and how you work. Keep it to a few minutes; the meeting is about their home.
2. Pricing	Local market snapshot, comparable sales, and your recommended price strategy. Bring your own current MLS data.
3. Marketing	Prep and staging, photos and media, online exposure, showings and open houses, and a launch timeline.
4. Offers to closing	How you'll compare offers, the contract-to-close steps, an estimated net sheet, and how you'll keep them updated.

Before, during, and after

Before

Send a pre-listing packet 24 to 48 hours ahead so the seller arrives informed. Update comps the night before.

During

Ask questions first: timeline, next move, concerns. Then present, and let them react to each section.

After

Follow up within 24 hours with a summary, answers to open questions, and clear next steps.

One habit that changes everything

Ask the seller, "What would make this the best move you've ever made?" Write the answer down and refer back to it when you present your plan.

COMPARABLE SALES
What similar homes nearby actually sold for

Address	Sale Date	Sale Price	Sale Price / Sq Ft	Sale Price / Lot	Sale Price / Lot
1234 Main Street St	4/15	\$280,000	\$120	\$120	\$120
5678 Maple Drive Dr	4/10	\$290,000	\$125	\$125	\$125
9012 Cedar Avenue Av	3/25	\$275,000	\$118	\$118	\$118
3456 Birch Lane Ln	4/12	\$285,000	\$122	\$122	\$122
7890 Elm Way Way	4/18	\$295,000	\$128	\$128	\$128
New Home: 1234 Main Street St	4/15	\$280,000	\$120	\$120	\$120

Adjusted for size, condition, lot, and upgrades. Average of comparable: \$120/Sq Ft, \$120/Lot.

WANT IT DONE FOR YOU?

AgentNexo Listing Presentation for Sellers

A 25-slide editable deck (PowerPoint, Google Slides, Keynote) with pricing, comps table, marketing plan, offer comparison, seller net sheet, and speaker notes on every slide.

STEP 4

Social media on a schedule

Consistency beats brilliance. Three planned posts a week, every week, will keep you more visible than a burst of posts followed by silence.

The three-a-week rhythm

Monday · Tips

Buyer and seller tips, myth vs. fact, and how-to posts that show your expertise.

Wednesday · Listings & market

Just listed, just sold, open houses, and local market updates using your own MLS data.

Friday · Community

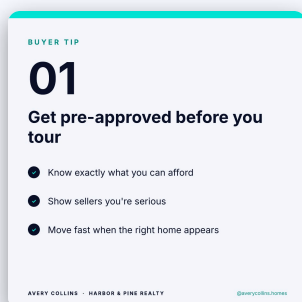
Local spotlights, client stories (with permission), polls, and engagement posts.

Batch it: one session a week

1. Look at next week's plan and swap in any real listings, sales, or open houses.
2. Design or edit three posts and write the captions.
3. Schedule them in your scheduler of choice.
4. Spend 10 to 15 minutes a day replying to comments and messages. That's where conversations start.

Caption formula

Hook (one line that stops the scroll) → **Value** (the tip, the home, the local fact) → **Call to action** (comment, message, or book a call). Add your brokerage name and any details your state and brokerage require in advertising.



WANT IT DONE FOR YOU?

AgentNexo Real Estate Social Media Kit

60 editable posts in 11 categories, each with a ready-to-edit caption, plus a 2027 content calendar with 160 planned posts on this exact Monday, Wednesday, Friday rhythm.

STEP 5

Transaction management without the chaos

Clients judge you on how calm the process feels. A clear checklist and a deadline tracker do most of that work for you.

Run every file the same way

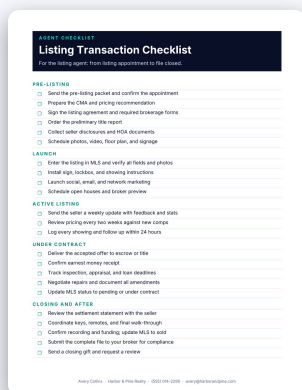
Stage	Your system
Before the deal	Give clients a checklist: sellers get prep and documents lists; buyers get finances, pre-approval documents, and a wish list.
Under contract	Write every contract deadline down on day one. Check it daily. Share key dates with your client.
Closing	Confirm walk-through, documents, keys and codes, and utility transfers well before the day.
After closing	Send a thank-you, ask for a review, and set the first past-client check-in date.

Three rules for deadlines

- ☐ Your deadlines come from your contract. Enter them as soon as the offer is accepted, and check whether your contract counts calendar or business days.
- ☐ Assign an owner to every milestone: you, the client, the lender, escrow or title.
- ☐ Send clients a short weekly update, even when nothing has changed. Silence creates worry.

Keep a weekly update simple

"Hi [Name], here's your weekly update for [address]. **Done:** [items]. **Next:** [items and dates]. **Need from you:** [items or 'nothing this week']. Questions anytime."



WANT IT DONE FOR YOU?

AgentNexo Buyer & Seller Checklist Pack

11 checklists for sellers, buyers, and agents (Word + PDF), plus a Transaction Deadline Tracker spreadsheet that calculates milestone dates from the acceptance date and color-codes what's due.

STEP 6

AI tools that save hours

Use AI for first drafts and busywork, so you can spend your time with people. Start with one job, not ten tools.

Eight jobs AI can help with

Job	What it helps with
Listing copy	Draft MLS descriptions, emails, and ad copy.
Lead follow-up and CRM	Respond to new leads quickly and keep your database warm.
Virtual staging and photos	Stage empty rooms and polish listing photos.
Social media	Draft posts, captions, and content calendars.
Transactions and admin	Contract-to-close timelines and inbox help.
Showings and AI calling	Book showings and qualify leads by text or phone.
CMAs and market reports	Build CMAs and home-value updates.
Video and tours	Listing videos, reels, and 3D tours.

The free AgentNexo directory at agentnexo.club lists AI tools for each of these jobs, with who each one is best for and its published pricing.

Three prompts to try today

LISTING DESCRIPTION

Write a 150-word MLS description for a [beds]/[baths] home in [area] with [3 features]. Warm, specific, no exaggeration. Describe the property, not the type of buyer it suits.

FOLLOW-UP TEXT

Write three short, friendly follow-up texts for a lead who asked about [address] and hasn't replied in [days]. Each under 200 characters, each ending with a simple question.

WEEKLY CONTENT

Give me three social post ideas for a real estate agent in [city] for [month]: one tip, one market post, and one community post, each with a one-line hook.

Always review AI output before you use it. Check facts and numbers, keep client personal information out of public AI tools, and review copy for fair housing language and your brokerage's advertising rules.

STEP 7

Your 12-month 2027 action calendar

One theme, one business focus, and one marketing focus per month. Plan each month in 20 minutes on the first workday.

Month	Theme	Business focus	Marketing focus
Jan	New year, new address	Write your goal math; clean up your database	Home value requests; pre-approval tips
Feb	Love where you live	Call your top past clients	Small upgrades; neighborhood guides
Mar	Spring market prep	Refresh your listing presentation and vendors	Pre-listing prep and staging
Apr	Curb appeal season	Schedule open houses for spring listings	Curb appeal; touring tips
May	First-time buyer month	Hold buyer consultations	Down payment myths; loan basics
Jun	National Homeownership Month	Mid-year review of your numbers	Equity check-ins; celebrate closings
Jul	Summer moves	Tighten your transaction system for busy season	Pricing in peak season; moving tips
Aug	Settling in	Post-closing follow-ups and review requests	Closing costs; moving logistics
Sep	Fall market opportunity	Re-engage leads who went quiet; plan Q4	Why fall can work for sellers and buyers
Oct	Cozy home season	Plan a client appreciation touch	Home maintenance; inspection basics
Nov	Gratitude month	Thank-you notes and referral conversations	Client appreciation; holiday-season moves
Dec	Year in review	Review 2027 and write your 2028 plan	Year-in-review and goal-setting posts

Key 2027 dates for your content

Jan 1 New Year's Day · Jan 18 MLK Jr. Day · Feb 14 Valentine's Day · Mar 20 First day of spring · May 9 Mother's Day · May 31 Memorial Day · Jun 1 National Homeownership Month begins · Jun 20 Father's Day · Jul 4 Independence Day · Sep 6 Labor Day · Oct 31 Halloween · Nov 11 Veterans Day · Nov 25 Thanksgiving · Dec 31 New Year's Eve

Plan the month in 20 minutes: on the first workday, (1) review last month's numbers, (2) pick the one business focus above and block time for it, (3) plan your posts around the theme and key dates, and (4) list the people you'll personally contact this month.

Monthly themes match the 2027 Content Calendar in the AgentNexo Social Media Kit, so your posts and your business priorities line up.

PUT IT TO WORK

Your first week

Day	One action
Mon	Fill in the goal table in Step 1 and block your three weekly time slots.
Tue	List your sphere and past clients in one place. Add a next-contact date for each.
Wed	Draft your listing presentation outline using the four parts in Step 3.
Thu	Plan next week's three posts and schedule them.
Fri	Set up a deadline list for any active file. Do your first 20-minute review.

Weekly scorecard

Activity	Goal	Done
Conversations		
New contacts added		
Follow-ups sent		
Appointments set		
Posts published		

Want the complete system?

The **Complete Edition** of The Ultimate 2027 Real Estate Agent takes every step in this guide and gives you the full playbook:

- Word-for-word scripts for sphere calls, open houses, listing appointments, and follow-up
- Weekly routines and a sample time-block schedule
- A day-by-day 90-day launch plan
- A KPI tracker table and fill-in worksheets
- An AI prompt library for agents
- A full 2027 monthly calendar with every month laid out
- And it includes all three AgentNexo kits: the Listing Presentation, the Social Media Kit, and the Buyer & Seller Checklist Pack

Find it in the **AgentNexo shop on Etsy**.

KEEP GOING

Get the tools and the tips, every month

Join the free AgentNexo newsletter for new AI tools for agents, practical prompts, and new templates.

Subscribe free at agentnexo.club

THE FULL PLAYBOOK

The Ultimate 2027 Real Estate Agent: Complete Edition

Scripts, routines, a 90-day plan, KPI tracker, AI prompt library, 2027 monthly calendar, and worksheets, with all three AgentNexo kits included. In the AgentNexo shop on Etsy.

FREE DIRECTORY

AI tools for real estate agents, sorted by job

Listing copy, lead follow-up, staging, social, transactions, AI calling, CMAs, and video, with who each tool is best for and published pricing.

This guide is for education and planning. It is not legal, tax, financial, or brokerage advice, and it makes no promise of income or results. Follow your brokerage's policies, your state's real estate and advertising rules, MLS rules, and fair housing laws. Tool names belong to their owners; AgentNexo is not affiliated with them unless stated. Made with AI-assisted tools, then written, edited, and checked by AgentNexo. © 2026 AgentNexo, operated by BAKERS OVEN LLC, Riverside, CA. You're welcome to share this free guide in its original form.