TASKS MENU

Real Estate Virtual Assistant

Real estate agents and investors have requested the tasks detail next.

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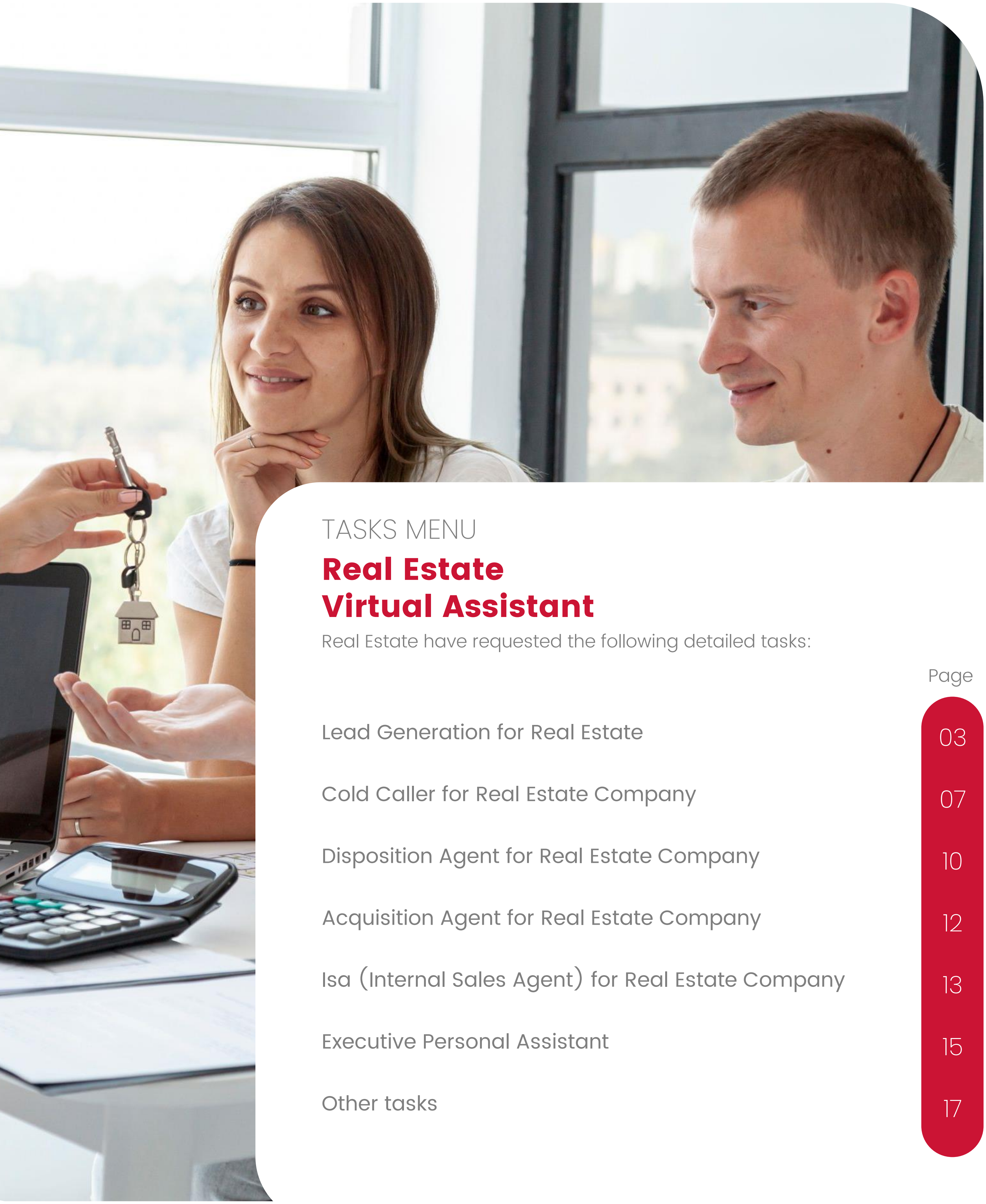


TASKS MENU

Real Estate Virtual Assistant

Real Estate have requested the following detailed tasks:

Lead Generation & Data Gathering

01

- Research for the name and phone numbers and clients' information to input into Excel.
- The client will provide him with a list of addresses, and the VA will go into LLC search, find the owners' names, dig deeper for the names and phone numbers, and input them into an Excel sheet.
- The VA won't be performing sales calls; they will be dialing the phone numbers they find to check if the phone rings, and if they work, the client will be the one to call them and perform the sales call..
- Research directories, websites, and Yellowpages online to gather new leads
- Build an Excel/Google sheets list with basic contact info.
- Sort list that can be turned into a CSV file to upload to any CRM or email software.

Executive/Personal Assistant

02

As an executive/personal assistant, the VA will have access to sensitive and private information that must keep secure and 100% private.

Help the CEO with various business-related tasks he/she is normally directly responsible for.

Personal Email management: Including reviewing, editing, archiving/labeling, prioritizing, etc.

Manage CRM & Data Entry

03

Convert files into digital format in Excel sheets.

Help the company organize, clean, update, and maintain the client's database.

Maintain all the communications and client data up-to-date.

Add new clients & update existing ones in the CRM system.

Process and handle customer support orders and/or tickets.

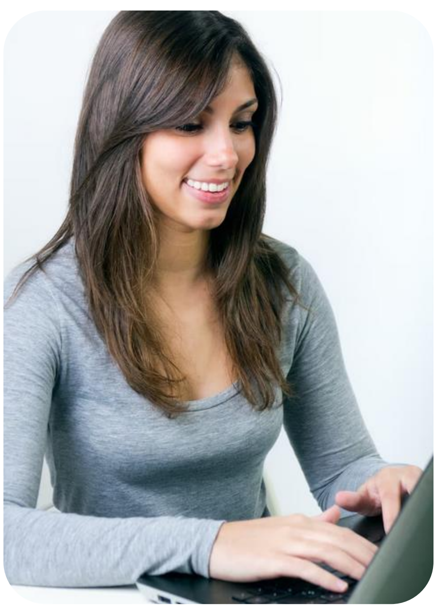
Repetitive data entry.

General Research

Research for the name and phone numbers and clients' information to input into Excel.

Online competitor's research.

Search for supplier/vendors information to contact.



Online research for events for the client to attend or participate.

Help with flight/travel research & online booking.

Organize Digital Files

05

- Upload/organize files into web-based systems (Excel).
- Re-organize files based on products/services/categories.
- Make sure that info is always up-to-date.
- Organize and input files by product, service, or client.

Call & Qualify Leads

06

- Use VoIP phone (Dialpad, Google Voice, Nextivia, etc.) to make calls and qualify leads.
- Learn English and/or Spanish scripts to know what to say in order to qualify leads.
- Call and tag leads as “cold”, “warm” or “hot” based on their interest level
- Call or text potential leads over the phone and offer information about the loans that the company offers to find out who would be interested in working with the company
- Perform warm calls to verify information when the company receives an inquiry
- Memorize English and/or Spanish scripts to know what to say in order to qualify leads
- .Call and tag leads as “cold”, “warm” or “hot” based on their interest level
- Call or text potential leads over the phone and offer information about the loans that the company offers to find out who would be interested in working with the company
- Perform warm calls to verify information when the company receives an inquiry.

Cold Calling

07

Cold call contacts gathered by lead generation or research.

Add call notes to a CRM system (as needed), and/or assign hot/interested leads as indicated for additional sales follow-up.

Call distressed property owners or people that may want to sell their house.

Cold call contacts gathered by the lead generation program they own.

Add call notes to a CRM system (as needed), and/or assign hot/interested leads to another team member for additional sales follow-up

SMS contacts gathered by the lead generation program they own.

The VA will cold call leads already provided to them and ask questions about the property, renovations, and interest in selling; all they need to ask from potential clients and submit to lead managers

When a client is ready to move forward and qualified, the VA will transfer the lead to the sales department in their team.

Call distressed property owners that may want to sell their house.

Call the owners of the houses offering to buy them if the house has the potential to be so.

Follow-up with Leads & Clients

08

Follow-up leads by phone, email, or text message as necessary until they request to stop or say "NO".

Perform an immediate follow-up after the client books a call.

Follow-up with the client/lead to making sure they show up for the phone/in-person appointment.

Follow-up with prospects/leads that didn't show up to an appointment and make sure they reschedule.

Follow-up on clients that don't answer and leave a voicemail or a text.

Follow up with other realtors, share updates, and status of referred leads.

Follow-up with people who are losing their homes or are inheriting a house.

Follow up with people who didn't have the money yet but might have it later or similar.

Lead Generation & List Building

09

Lead Generation & List Building.

Build Excel/Google sheets with basic contact information.

Sort lists that can be turned into CSV files to upload to any CRM or email software.

Calendar Management & Appointment Setting

10

Initially, the VA will divert the interested clients to a real estate agent to coordinate the booking..

Help leads book calls with real estate agents manually or using booking systems like Calendly.

Send a calendar invite to both realtors and leads/clients

Add Clients to Sales Pipeline

11

Receive an email for a new real estate deal in the company's pipeline (buyers or sellers pipeline).

Add deals to a system spreadsheet after receiving an email for a new real estate deal in the company's pipeline (buyers or sellers pipeline).

Disposition Agent for Real Estate Company

12

- Disposition Agent for Real Estate Company.
- Cooperate with buyers, and partners to arrange property inspections and visits.
- Market properties through established procedures and marketing channels like ads, text, calls, listing services, social media, and emails
- Develop networks with attorneys, mortgage lenders, contractors, real estate agents, and wholesalers.
- Build rapport and cultivate strong client relationships with Sellers and participate in negotiations to facilitate a signed contract.
- Proficient with various commonly used technology platforms, or willing to learn (Google Suite, Mailchimp, etc).
- Monitor the sales process and document follow-up by tracking all interaction details in the CRM.
- Track daily/weekly/monthly data and company goals.
- Develop and implement marketing strategies to sell properties quickly and at the best possible price.
- Increasing the current list of potential investor buyers.
- Coordinate with the acquisition team to ensure that properties are prepared for sale and marketed effectively.
- Provide regular updates to management on the status of each property sale.
- Conduct market research and analysis to stay current on real estate trends and make informed pricing decisions.

Call & Qualify Leads

13

01 Use VoIP phone (Dialpad, Google Voice, Nextivia, etc) to make calls and qualify leads.

02 Memorize English and/or Spanish scripts to know what to say in order to qualify leads..

03 Call and tag leads as “cold”, “warm” or “hot” based on their interest level.

04 Call or text potential leads over the phone and gather motivation and the needed information during the calls to identify those interested in selling their house or working with the company.

ACQUISITION AGENT FOR REAL ESTATE COMPANY

Cold Calling

1. Cold Calling.
2. Call distressed property owners or people that may want to sell their house.
3. Add call notes to a CRM system (as needed), and/or assign hot/interested leads as indicated for additional sales follow-up.
4. Call the property owners offering to buy their property if the property has the potential to be sold at a discount or on terms..

Manage CRM & Data Entry

1. Help the company organize, clean, update, and maintain the client's database.
2. Maintain all the communications and client data up-to-date.
3. Add contacts, and new clients, and update existing ones in the CRM system..
4. Verify and update the contact's information. Get missing emails or addresses.
5. Keep track of tasks using the client's CRM or project management software..
6. Collect leads from different sources and put all the leads contacts in a single database or CRM sales pipeline..
7. Update timeline information, asking price, owner situation, and sale price information in deal notes..
8. Import leads into CRM via a CSV file or manually.
9. Input referrals into the CRM, and assign them as indicated..
10. Save any notes from the calls into the CRM during the calls..
11. Tag contact and input call notes..
12. Create follow-up tasks to call contact later.

Follow-up with Leads & Clients

1. Create follow-up email templates or use existing ones to trigger follow-up campaigns as needed or indicated.
2. Follow-up leads by phone, email, or text message as necessary until they say request to be removed or say "NO".
3. Follow up with the client/lead to making sure they show up for the phone/in-person appointment.
4. Follow-up with prospects/leads that didn't show up to a phone/in-person appointment and make sure they reschedule.
5. Follow-up on clients that don't answer and leave a voicemail or a text.

ISA (INTERNAL SALES AGENT) FOR REAL ESTATE COMPANY

Coordinate and Schedule Closing Tasks & Walkthrough

1. Coordinate with someone to walk through the property to ensure everything is as expected..
2. Perform a 24-hour follow-up prior to timeline dates with the agent..
3. Be in charge of ordering a closing gift, a gift for the buyer for closing the purchase of a house/property.
4. Coordinate the retrieval of the lockbox for where the keys to the house were stored (if representing the seller).
5. Ensure to receive a copy of all checks and a closing statement from the title company for SkySlope.

Warm Calling Existing Leads

1. Call potential leads over the phone and offer information about the services the company offers.
2. Perform outbound calls to past clients or existing leads the company already has.
3. Speak with each lead, take notes, and then add them to the CRM.
4. Call leads and prospects to book demos and/or introductory calls manually or through online booking systems like Acuity.
5. Invite clients to events and ask for referrals.

Follow-up with Leads & Clients

1. Create follow-up email templates.
2. Follow-up leads by phone, email, or text message as necessary until they say “NO”.
3. Perform immediate follow-up after the client books a call.
4. Follow up with the client/lead to ensure they show up for the phone or in-person appointment..
5. Follow up with prospects/leads that didn’t show up to an appointment and make sure they reschedule.
6. Ask clients to add reviews to the websites where they found the company-Follow-up on clients that don’t answer and leave a voicemail or a text.
7. Follow up with other realtors, share updates, and status of referred leads.
8. Follow up with people who are losing their homes, or are inheriting a house.
9. Follow up with people who said they didn’t have the money yet but might have it later or similar.
10. Send digital thank you cards to the retail/clients who referred the company to others.
11. Send out contractual reminders via email/text 24-48 hours prior to the deadline or similar.

Sales Transaction Coordination and Scheduling

1. Typically, the VA will be calling, and then the second option is texting.
2. They sometimes have a general addendum in a transaction, the VA will use forms for the client to sign and follow up till they do.
3. Update all dates and pertinent info into custom fields in CRM.
4. Send out a timeline email to the client and copy agent, the lender (if representing buyer), and title company.
5. Send out a separate timeline email to the cooperating agent/broker.
6. Copy and paste the timeline into Deal Section notes and update the total commission, closing date, and sale price. Update CTE with all dates and contacts (escrow, lender, title, etc.) and terms.
7. Get inspection and appraisal dates filled into CTE.

Manage CRM & Data Entry

1. Help the company organize, clean, update, and maintain the client's database.
2. Maintain all the communications and client data up-to-date.
3. Add contacts, and new clients & update existing ones in the CRM system.
4. Verify and update the contact's info. Get missing emails or addresses.
5. Keep track of tasks using Trello or any other project management tool.
6. Export, consolidate, and gather data from different platforms like Trello, Facebook,
7. FollowUp Boss, and others and manually save them.
8. Collect leads from different sources and put all the leads contacts in a single database or CRM sales pipeline.
9. If a CTE (commitment to excellence) system spreadsheet exists, add deals to it.
10. Update timeline information, commission, closing date, and sale price information in deal notes.
11. Get an inspection and appraisal dates filled into CTE.
12. Update CTE with all dates and contacts (escrow, lender, title, etc.) and terms.
13. Import leads into CRM via a CSV file or manually.
14. Input referrals into the CRM, and assign them to one of the agents.
15. Save any notes from the calls into the CRM, after the lead books a call.
16. Tag contact and input call notes. Create follow-up tasks to call contact later.

EXECUTIVE PERSONAL ASSISTANT

Executive/Personal Assistant

1. Help the CEO with various business-related tasks he/she is normally directly responsible for.
2. Answering & screening calls.
3. Personal Email management including reviewing, editing, archiving/labeling, prioritizing, etc.
4. Manage & schedule the client's personal and business calendar.
5. Basic project management: Review weekly tasks, processes, and projects due.
6. Support managing team members, their work, and results.
7. Help prioritize how the client invests their time.

Calendar Management & Appointment Setting

1. Manage client/owner emails and their calendar.
2. Set up automatic bookings online and share booking links with lead/clients as needed.
3. Help leads book calls with real estate agents manually or using booking systems.
4. Review the calendar and find out about availability to set calls or appointments with team leaders.
5. Send a calendar invite to both realtors and leads/clients.
6. Send a calendar invite to both realtors and leads/clients.

Organize Digital Files

1. Upload/organize files into web-based systems (Dropbox, Google Drive, etc).
2. Re-organize files based on products/services/categories.
3. Make sure that info is always up-to-date.
4. Organize and input files by product, service, or client.

Manage CRM & Data Entry

1. Help the company organize, clean, update, and maintain the client's database.
2. Maintain all of the communications and client data up-to-date.
3. Add contacts, new clients and update existing ones into the CRM system.
4. Verify and update the contact's information. Get missing emails or addresses.
5. Input referrals into the CRM, and assign them to one of the agents.
6. Save any notes from the calls into the CRM, after the lead books a call.
7. Tag contact and input call notes. Create follow-up tasks to call contact later.

Other General Admin Tasks

1. Help the client develop, create, and document the company's SOPs (standard operating procedures).
2. Perform clerical work and general admin tasks related to real estate.
3. Filling out property information sheets.
4. Help the client set up a web-based phone.
5. Help set up Google calendar and teach the owner of the company how to use it.
6. Coordinate retrieval of the lockbox where the keys to the house were stored (if representing seller).
7. Coordinate someone to walk through the property to ensure everything is as expected.
8. Organize all clients' files required for loan applications.
9. Customize letters using templates.
10. Order closing gifts. A gift for the buyer for closing the purchase of a house/property.
11. Prepare board packages.
12. Help with the client organize "Client Appreciation Events".

Schedule Property's Photo Sessions & Update Listings

1. Coordinate with the listing coordinator to get photography scheduled and make sure all documents have been received, including HOA (Homeowners association) and seller's disclosure.
2. Update the property listings once the photos are ready.
3. Help with inputting the listing into the MLS.

ORGANIZED BY TASKS

SMS/Call & Qualify Leads

1. The VA will mainly send out Cold Outreach SMS to the leads generated by the lead generation system, Launch Control..
2. Use VoIP phone (Dialpad, Google Voice, Nextiva, etc) to make calls and qualify leads– Learn English and/or Spanish scripts to know what to say in order to qualify leads– Call leads generated through Launch Control.
3. Call and qualify cold leads from Launch Control.
4. Call and tag leads as “cold”, “warm” or “hot” based on their interest level.
5. Call or text potential leads over the phone and offer information about what the company offers to find out who would be interested in working with the company.– Perform warm calls to verify information when the company receives an inquiry.

Follow-up with Leads & Clients

1. Create follow-up email templates or use existing ones to trigger follow-up campaigns as needed or indicated.
2. Follow-up leads by phone, email, or text message as necessary until they say a request to be removed or say “NO”.
3. Follow up with the client/lead to make sure they show up for the phone/in-person appointment.
4. Follow up with prospects/leads that didn’t show up to a phone/in-person appointment and make sure they reschedule.
5. Ask clients to add reviews to the websites where they found the company.
6. Follow up on clients/leads that don’t answer and leave a voicemail or a text.
7. Follow up with other realtors, share updates, and the status of referred leads.
8. Follow up with people that are selling, buying or who are losing their properties.
9. Follow up with people who didn’t have the money yet but might have it later or similar.
10. Send digital thank you cards to the retail/clients who referred the company to others.

Manage CRM & Data Entry

1. Help the company organize, clean, update, and maintain the client’s database.
2. Maintain all the communications and client data up-to-date.
3. Add contacts, and new clients and update existing ones into the CRM system.
4. Verify and update the contact’s information. Get missing emails or addresses.
5. Keep track of tasks using the client’s project management software or spreadsheet.
6. Collect leads from different sources and put all the leads contacts in a single database or CRM sales pipeline.

7. Update timeline information, commission, closing date, and sale price information into deal notes.
8. Import leads into CRM via a CSV file or manually..
9. Input referrals into the CRM, and assign them as required.
10. Save any notes from the calls into the CRM, during the calls and tag them as indicated..
11. Tag contact and input call notes.
12. Create follow-up tasks to call contact later.

Customer Service & Support

1. Reply to emails and phone calls, talk to anyone who needs help.
2. Answer calls from people requesting information.
3. Answer frequent questions, such as “Do you offer X services?”, “Where can I find the link to the meeting?”, or “I want to learn more about the X product/services”, etc.
4. Provide support through text messages, email, or phone.
5. Send emails and/or text messages to update clients about the status of their process to buy/sell land..

Calendar Management & Appointment Setting

1. Initially, the VA will divert the interested clients to a real estate agent to coordinate the booking.
2. Help leads book calls with real estate agents manually or using booking systems like Calendly.
3. Send a calendar invite to both realtors and leads/clients.

Other General Admin tasks

1. Perform clerical work and general admin tasks related to real estate.

PRO TOP VA

Book A Call

TASKS MENU

Property Management & Airbnb

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