

Process Checklist



Discovery Call

We tailor virtual staffing solutions to meet your business needs and goals. This consultation sets the foundation for a customized plan, addressing your immediate challenges and paving the way for future success.



Process Development

The Process Mapping Call

- KPI
- Metrics
- Expectations
- Tasks

The Process Discussion Call

- Tool Navigation
- Process Walkthrough and Deep Dive
- KPI Target Discussion
- VA Integration into Tools



Placements

- Identification and profiling of candidates
- A summary of profiled candidates prior to the interview
- Managing the interview process
- Post-interview debrief session



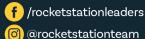
Operations

- Scheduling
- Building KPIs
- Daily Tracking
- Managing Holiday
- Billing and Bonuses
- Identifying and Addressing Issues / Opportunities

Virtual Assistants Task List

CIXOS .	SALES SUPPORT (PHONES)		LIST
	 □ Prospecting For Motivated Buyers/Sellers □ Accept and Handle Incoming Calls From Flyers, Signs, Postcards, etc □ Lead Screening and Appointment Setting □ Follow-up Scheduling and Lead Nurturing 		☐ Mo (Pr ☐ Cre ☐ Edi ☐ Mo on
Q	ADMINISTRATIVE SUPPORT		
(Receptionist	(E)	TRA
	☐ Manage Calendars (Travel Plans,		☐ Mo
	Appointments, Personal Events, etc)		Со
	 Database Management (Top Producer 8i, Podio, etc) 		☐ Mo
En:	MARKETING & SOCIAL MEDIA		
	 □ Create Branded Fliers, Presentations, Videos, Ads, etc □ Create/Manage Email Drip Campaigns and 		VALU
	Templates		□ Pre
	Search Engine Optimization (SEO)		Co
	Web Advertising (Craigslist, Realtor.com, etc)		Sto
	 ☐ Manage Social Media Branding and Presence ☐ Manage and Write For Your Blog 		
		TIT.	REA
	ACCOUNTING & BOOKKEEPING		☐ Se

	LISTING MANAGEMENT
	 Manage, Review, and Gather Documents for Listing (Prepare Listing Packet or Listing Presentation) Create New MLS Listings and Upload Photos Edit and Upload Video Home Tours Manage MLS Postings and Properties Advertised on Other Websites
(E)	TRANSACTION COORDINATION
	 Maintain The Escrow Closing Process Complete All Transaction Process Tasks Monitor Timeline For Your Properties Work With All Parties to Facilitate Closing (Buyer, Seller, Agents, Inspectors, Title, etc)
	VALUATIONS
	□ Prepare Broker Price Opinion (BPO)□ Comparable Market Analysis (CMA)□ Status Reports
TILL OF	REAL ESTATE TASK
	□ Seller Leαd System□ Property Analysis□ Agent Enrollment







on Quickbooks)

Reconciling Bank Statements

Transfer Utilities For Vacant Properties

Monitor Accounts Payable and Receivable (Usually



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Build Buyers List Social Media Branding

Selling Deals