



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 Hours
- Billing and Bonuses
- Identifying and Addressing Issues / Opportunities

Virtual Assistants Task List



SALES SUPPORT (PHONES)

- ☐ 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



ADMINISTRATIVE SUPPORT

- ☐ Receptionist
- ☐ Manage Calendars (Travel Plans, Appointments, Personal Events, etc)
- ☐ Database Management (Top Producer 8i, Podio, etc)



MARKETING & SOCIAL MEDIA

- ☐ Create Branded Fliers, Presentations, Videos, Ads, etc
- ☐ Create/Manage Email Drip Campaigns and Templates
- ☐ Search Engine Optimization (SEO)
- ☐ Web Advertising (Craigslist, Realtor.com, etc)
- ☐ Manage Social Media Branding and Presence
- ☐ Manage and Write For Your Blog



ACCOUNTING & BOOKKEEPING

- ☐ Monitor Accounts Payable and Receivable (Usually on Quickbooks)
- ☐ Reconciling Bank Statements
- ☐ Transfer Utilities For Vacant Properties



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



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



REAL ESTATE TASK

- ☐ Seller Lead System
- ☐ Property Analysis
- ☐ Agent Enrollment
- ☐ Build Buyers List
- ☐ Social Media Branding
- ☐ Selling Deals

