Tasks Menu

Real Estate Virtual Assistant

Real Estate businesses & entrepreneurs have requested the following detailed tasks:

GENERAL SALES & CUSTOMER SERVICE TASKS

1 Call & Qualify Leads

- 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 leads generated through social media, Reddit, Facebook Ad Campaigns, etc.
- Call and qualify leads from different sources like Realtor.com or Zillow.com
- 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

2 Cold Calling

- Cold call contacts gathered by lead generation or research
- Call distressed owners or people that may want to sell their house
- Call people interested in buying/selling their house
- Add call notes to a CRM system (as needed), and/or assign hot/interested leads to another team member for additional sales follow-up
- Call the owners of the houses offering to buy them if the house has the potential to be sold

3 Warm Calling Existing Leads

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

4 Customer Service & Support

- Reply to emails and phone calls, talk to anyone who needs help
- Answer calls from people requesting information
- Answer frequent questions, such as “Do you offer X services?”, or “Where can I find the link to the meeting?”, or “I want to learn more about the X product/services”, etc.
- Provide support through text messages, email or phone
- Send emails and/or a text messages to update clients about the status of their process to buy/sell a home and/or their loan process to get the money they need to finance a home
- Help figure out the problems with titles that are “rejected” by the client or have some issue
- Ensure that the “rejected” titles are sent to the company’s staff that is in charge of reviewing them

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5 Follow-up with Leads & Clients

- Create follow-up email templates
- Follow-up leads by phone, email, or text message as necessary until they say "NO"
- Perform an immediate follow-up after client books a call
- Follow-up with the client/lead to make 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
- 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
- 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
- Send digital thank you cards to the retail/clients who referred the company to others
- Send out contractual reminders via email/text 24-48 hours prior to the deadline or similar

6 Lead Generation & List Building

- Help find local businesses by doing online research
- Build Excel/Google sheets with basic contact information
- Sort lists that can be turned into a CSV files to upload on any CRM or email software
- Reach out to law offices that do real estate transactions who may be interested in partnering
- Reach out to title insurance companies who may be interested in partnering

7 Other General Sales tasks

- Pre-screen new potential clients, and make sure they're the right fit to be clients
- Speak to people over the phone and turn leads into clients
- Outbound calling, e-mail communication, coordination and scheduling of real estate buying and selling opportunities and overall management of sales pipeline
- Help with upselling additional services to existing clients
- Follow-up with existing clients to gather feedback and/or reviews
- Receive and track emails for new real estate deals in the company's pipeline (buyers or sellers pipeline)

GENERAL ADMIN SUPPORT

8 Calendar Management & Appointment Setting

- Manage client/owner emails and their calendar
- Set-up automatic bookings online and share booking link with lead/clients as needed
- Help leads book calls with real estate agents manually or using booking systems like Calendly
- Review the calendar and find out about availability to set calls or appointments with team leaders
- Send a calendar invite to both realtors and leads/clients
- Set appointments with corporate/investment banking and capital investors for introductions in real estate and other fields
- Set calls/appointments with acquisition experts
- Update all dates and pertinent information into software custom fields like FUB (Followupboss.com)

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9 Manage CRM & Data Entry

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

10 Loan Processing

- Look for businesses that need help for loans for their business
- Create and process loans for clients
- Complete any missing information (addresses, names, etc.) on client's loan applications
- Manage documents for property titles, appraisals info, homeowners insurance, etc.
- Follow-up with government agencies that are providing loans
- Help support clients with figuring out how to sign documents online
- Follow-up with title companies, contacting banks, etc.
- Request and gather all necessary documents for loan eligibility
- Submit applications to the various banks that the mortgage company works with
- Request loans from the banks
- Submit loan processing information into CRM
- Submit applications to the government agencies that offer loans

11 Digital Files Management

- Organize digital files and help manage documents online
- Help digitize paperwork using Google Sheets and Dropbox to share files
- Upload/organize files into web-based systems (Dropbox, Google Drive, etc).
- Make sure that information is always up-to-date. For example, when a property is sold, move information from one contact/owner to another
- Re-organize files based on communities, buildings, or by year, etc.
- Convert files into digital format in Excel sheets

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12 Contract Creation & Setup

- Support realtors with creating an agreement for selling/buying houses
- Use ZipForms, Docusign or similar sites to prepare online forms, and send them to customers to get documents digitally signed
- Coordinate with HOA (homeowners association) to obtain necessary documents
- Ensure receipt of a copy of all checks and closing statements from the title company for transaction management using SkySlope or similar
- Make sure the company gets all executed documents including HOA (Homeowners association) and seller's disclosure
- Prepare addendums/extensions for pending transactions being coordinated
- Provide disclosures to the agent(s)
- Setup & create agreements
- Track timelines for purchase & listing agreement(s)

13 Create and Manage Real Estate Listings (MLS)

- Write content for property listings: home description, specifications, details, etc.
- Complete "New listing checklist" if your team already has one, or design one
- Send emails to seller/tenant with information about listing and how showings will be handled
- Create and add new/old listings, sales, and rentals to all sites like MLS, LoopNet, Officelease.com, or similar.
- Create listings with all the property details (address, size, info, photos, etc).
- Edit and change already posted listings
- Update property listing in CTE (Commitment to Excellence) system spreadsheet, DotLoop, SkySlope property listings, etc.

14 Contract Management & Follow-up

- Contact the title officer to review the property's title
- Request original house floor plans
- Schedule a team visit to measure the property's square footage and interior rooms
- Schedule photographers and videographers
- Request and confirm seller's current loan information
- Contact mortgage companies and loan officers & follow-up
- Request current appraisals, and review if available
- Research and order copy of homeowner association bylaws
- Research utility companies and phone numbers, and calculate average monthly bills
- Arrange for a yard sign installation

15 Other General Admin tasks

- Perform clerical work and general admin tasks related to real estate
- Filling out property information sheets
- Help the client set up a web-based phone or Google Voice
- Help set up Google calendar and teach the owner of the company how to use it
- Coordinate retrieval of the lockbox where the keys to the house were stored (if representing seller)
- Coordinate someone to walk through the property to ensure everything is as expected
- Organize all clients' files required for loan applications
- Gather and organize all necessary documents for a sales/purchase

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- Track timelines for purchase & listing agreement(s)
- Customize letters using templates
- Order closing gifts. A gift for the buyer for closing the purchase of a house/property
- Prepare board packages
- Basic bookkeeping. Create quotes/invoices to send to the company's leads & clients

TRANSACTION COORDINATOR TASKS

16 Add Clients to Sales Pipeline

- 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).
- Update CTE, DotLoop and create a SkySlope file
- Make sure all signatures and initials are bilateral

17 Schedule Property's Photography Session & Update Listings

- 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
- Update the property listings once the photos are ready

18 Sales Transactions Coordination and Scheduling

- Update all dates and pertinent information into custom fields in FUB
- Send out timeline email to client and copy agent, lender (if representing buyer), and title company
- Send out a separate timeline email to the cooperating agent/broker
- Copy and paste timeline into Deal Section notes and update total commission, closing date, and sale price. Update CTE with all dates and contacts (escrow, lender, title, etc.) and terms.
- Get an inspection and appraisal dates filled into CTE

19 Coordinate and Schedule Closings Tasks & Walkthrough

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

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