



ESSENTIAL TASKS

for your Virtual Assistant

MOD
VIRTUAL



Goal Setting, Planning & Leadership

- Review Annual/Monthly/Weekly Goals (4-1-1)
- Maintain Planned Use of Time
- Schedule Play Days
- Take Play Days

Lead Generation, Advertising, & Promotion

- Lead Tracking and Coordination
- Maintain a File of Testimonials

Seller Prospecting & Servicing

- Prospect for Listings - General
- Prospect - Expireds
- Prospect - For Sale By Owners
- Prospect - Geographic Farm
- Prospect - Past Clients & Allied Resources
- Lead Follow-up

Buyer Prospecting & Servicing

- Prospect for Buyers
- Follow-up on Buyer Leads
- Set Buyer Appointments

Transaction & Closing Coordination

- Obtain Testimonials & Referrals

Transaction & Closing Coordination

- Answer Phones
- Take and Deliver Messages
- Check Voice Mail
- Return Calls
- Send and Receive Faxes
- Send and Receive E-Mail
- Maintain Real Estate License
- Schedule and Attend Training

Goal Setting, Planning & Leadership

- Implement Systems
- Review Annual/Monthly/Weekly Goals (4-1-1)
- Maintain Planned Use of Time
- Schedule Play Days
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Seller Prospecting & Servicing

- Complete the Listing Contract
- Provide a Sellers Net Sheet
- Obtain an Estimate of Closing Costs
- Assist in the Selection of Service Providers
- Initiate the Closing/Title Process

Buyer Prospecting & Servicing

- Complete the Buyer Rep. Agreement
- Obtain an Estimate of Closing Costs
- Assist in the Selection of Service Providers
- Initiate the Closing/Title Process

Transaction & Closing Coordination

- Set Up Contract to Closing File
- Fill Out Greensheet
- Establish Communication With All Parties
- Advise Parties on Timetable to Closing
- Coordinate Loan Application Process
- Coordinate Inspections
- Advise on Repairs
- Assist with Appraisals
- Coordinate the Closing Process
- Schedule the Closing
- Confirm the Distribution Authorization (DA)
- Review the Closing Paperwork (HUD-1)
- Insure for All Filings and Notifications
- Arrange for Closing Gifts or Events
- Assist With Occupancy or Relocation
- Provide Post Closing Information & Service
- Obtain Testimonials & Referrals

Administration & Accounting

- Maintain Listing Property Files
- Maintain Contract Files
- Make Copies
- Make Appointments for Showings
- Maintain All Databases
- Inventory Signs and Lock Boxes

Research & Communications

- Take and Deliver Messages
- Check Voice Mail
- Return Calls
- Send and Receive Faxes
- Send and Receive E-Mail
- Schedule and Attend Training

Goal Setting, Planning & Leadership

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- Insure for All Filings and Notifications
- Provide Post Closing Information & Service

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Research & Communications

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- Maintain Real Estate License
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Goal Setting, Planning & Leadership

- Implement Systems
- Review Annual/Monthly/Weekly Goals (4-1-1)
- Allied Resourcing
- Maintain Planned Use of Time
- Schedule Play Days

Lead Generation, Advertising, & Promotion

- Write & Place Advertising Produce
- Graphics and Feature Sheets
- Photography
- Prepare Listing Packages
- Select Graphics Vendors
- Select Advertising Vendors
- Design & Maintain Website
- Set up & Maintain Talking Ads (IVR)
- Handle Consumer Complaints

Seller Prospecting & Servicing

- Prepare and Deliver a Pre-Listing Package
- Complete the Listing Contract
- Provide a Sellers Net Sheet
- Arrange for Signs
- Arrange for the Lock Box
- Set up Showing Procedures
- Take or Arrange for Photographs
- Put Information in the MLS
- Put in or Link to Websites
- Provide Graphic Feature Sheets
- Arrange for Flyers and Marketing Materials
- Arrange for an Office Tour
- Arrange for a Broker Open House
- Provide Feedback from Showings
- Update the MLS and Websites
- Obtain an Estimate of Closing Costs
- Initiate the Closing/Title Process

Buyer Prospecting & Servicing

- Follow-up on Buyer Leads
- Send Updates to Out of Town Buyers
- Arrange for House-Hunting Visits

Administration & Accounting

- Maintain Listing Property Files
- Make Copies
- Make Appointments for Showings
- Maintain All Databases
- Inventory Signs and Lock Boxes

Research & Communications

- Answer Phones
- Take and Deliver Messages
- Check Voice Mail
- Return Calls
- Send and Receive Faxes
- Send and Receive E-Mail
- Deal With Correspondence
- Maintain Real Estate License
- Schedule and Attend Training

Goal Setting, Planning & Leadership

- Review Annual/Monthly/Weekly Goals (4-1-1)
- Maintain Planned Use of Time
- Schedule Play Days
- Take Play Days

Lead Generation, Advertising, & Production

- Contact Management (client database)
- Lead Tracking and Coordination
- Maintain a File of Testimonials

Seller Prospecting & Servicing

- Lead Follow-up

Transaction & Closing Coordination

- Obtain Testimonials & Referrals

Administration & Accounting

- Schedule Events and Meetings
- Maintain All Databases

Research & Communications

- Answer Phones
- Take and Deliver Messages
- Check Voice Mail
- Return Calls
- Send and Receive Faxes
- Send and Receive E-Mail
- Provide 800#
- Maintain Real Estate License
- Schedule and Attend Training

Goal Setting, Planning & Leadership

- Career Vision
- Train
- Coach & Consult
- Design Systems
- Implement Systems
- Take Play Days
- Set Goals & Develop Plans
- Review Annual/Monthly/Weekly Goals
- Maintain Planned Use of Time
- Schedule Play Days

Lead Generation, Advertising, & Promotion

- Contact Management (client database)
- Lead Tracking and Coordination
- Design Marketing Materials
- Write & Place Advertising
- Produce Graphics and Feature Sheets
- Photography
- Prepare Listing Packages
- Prepare Buyer Packages
- Prepare Relocation Packages
- Organize Promotional Events
- Purchase Gifts & Promotional Items
- Implement Promotional Campaigns
- Select Graphics Vendors
- Select Advertising Vendors
- Write & Place PR Stories
- Coordinating Community Involvement
- Coordinate Community Service
- Design & Maintain Website
- Set up & Maintain Talking Ads (IVR)
- Research New Marketing Opportunities
- Maintain a File of Testimonials
- Handle Consumer ComplaintsVVVV

Seller Prospecting & Servicing

- Research the Market & Prepare a CMA
- Prepare and Deliver a Pre-Listing Package
- Arrange for Signs
- Arrange for the Lock Box
- Set up Showing Procedures
- Take or Arrange for Photographs
- Put Information in the MLS
- Put in or Link to Websites
- Provide Graphic Feature Sheets
- Arrange for Flyers and Marketing Materials
- Arrange for an Office Tour
- Arrange for a Broker Open House
- Provide Feedback from Showings
- Update the MLS and Websites

Buyer Prospecting & Servicing

- Provide a Buyer Representation Packet
- Research the MLS
- Send Updates to Out of Town Buyers
- Arrange for House-Hunting Visits
- Provide Pricing & Market Research

Administration & Accounting

- Set Up and Maintain All Files
- Maintain Listing Property Files
- Maintain Contract Files
- Maintain Archives
- Make Copies
- Open and Distribute Mail
- Read and Answer Mail
- Buy Supplies
- Inventory Supplies
- Make Appointments for Showings
- Schedule Events and Meetings
- Maintain All Databases
- Maintain Equipment
- Inventory Signs and Lock Boxes
- Arrange for Coverage and Availability
- Set Up and Maintain Chart of Accounts
- Make Deposits
- Review Bills
- Write Checks
- Do Bookkeeping
- Produce Monthly P&L Statements
- Prepare for Tax Filings

Research & Communications

- Answer Phones
- Take and Deliver Messages
- Check Voice Mail
- Return Calls
- Send and Receive Faxes
- Send and Receive E-Mail
- Deal With Correspondence
- Provide 800#
- Maintain Real Estate License
- Schedule and Attend Training
- Research Technology and the Internet