



VA TASK CHECKLIST

720.979.3049 • egsolutions.ph • P.O. Box 33932 Northglenn, CO. 80233

1. Administrative Work

- 1.1. Birthday Shout Outs (Sending Birthday cards)
- 1.2. B2B Appointment Setting/reminder (Business to Business)
- 1.3. Scrubbing Networking opportunities
- 1.4. Schedule CE Classes
- 1.5. Calendar Management
- 1.6. Client Event Coordination
- 1.7. Collecting Client Reviews
- 1.8. CRM Management
- 1.9. Create and Manage Team Tasks
- 1.10. Database Cleanup
- 1.11. Daily Appointment Confirmations
- 1.12. Email Management
- 1.13. Finding Open Houses
- 1.14. Help Track Showing Feedback (Listings)
- 1.15. Inbound Phone Calls (Support)
- 1.16. Listing Input
- 1.17. Remind Agent/Team of Daily and Recurring Tasks
- 1.18. Remind Agent/Team to call Clients on their Anniversaries
- 1.19. Preparation of Pre-Listing Packet
- 1.20. Profile Updating
- 1.21. Property Management Coordination
- 1.22. Schedule Meetings
- 1.23. Scheduling Showings
- 1.24. Send Email Out to Reverse Prospects
- 1.25. Send Anniversary Email, Card, or Message
- 1.26. Setting up Buyers in Auto search
- 1.27. Transaction Management (non-compliance only)
- 1.28. Task Management
- 1.29. Team ONBOARDING
- 1.30. Thank you card Post Appointment
- 1.31. Vendor Management
- 1.32. Weekly/Daily Seller Updates (For Listings)



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2. **Marketing:**

- 2.1. Managing a Brand Kit
- 2.2. Listing Marketing (Coming soon, Just listed, Under Contract, Closed)
- 2.3. Facebook Ads
- 2.4. Facebook Business Page Management
- 2.5. Instagram Page Management
- 2.6. Running Your LinkedIn
- 2.7. Running a VIP Facebook Group
- 2.8. Monthly Market Update Video Blasts

3. **Lead Management:**

- 3.1. Lead Tracking
- 3.2. Lead Follow-up
- 3.3. Lead Management
- 3.4. Quarterly Check-In Calls
- 3.5. Warm Lead Follow-Up
- 3.6. Agent Referral Monitoring

4. **Finance:**

- 4.1. Expense Management
- 4.2. Receipt Management
- 4.3. Bookkeeping
- 4.4. Budgeting

5. **Others:**

- 5.1. Assist in non Business related tasks
- 5.2. Other Personal tasks