Real Estate Virtual Assistant Tasks Checklist

Zingo Assist
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Tick the tasks you will delegate to your assistant. Start with the daily list, then add weekly, listing and transaction tasks. Items in the last box stay with the licensed agent.

Daily tasks

- [ ] Call and text every new lead (web, portal, Zillow) within minutes of it arriving
- [ ] Log every call, text and email in the CRM with a next follow-up date
- [ ] Clear overdue CRM tasks and work the follow-up smart lists
- [ ] Triage the inbox and draft routine replies for agent approval
- [ ] Confirm today's showings, listing appointments and buyer consultations
- [ ] Check transaction deadlines due in the next 72 hours
- [ ] Schedule today's social media posts
- [ ] Send the agent an end-of-day report: leads, appointments, hot leads, blockers

Weekly tasks

- [ ] Nurture calls to leads who are 30 to 90 days out
- [ ] Send each seller their weekly activity report (showings, feedback, views)
- [ ] Request and log showing feedback from buyer agents
- [ ] CRM clean-up: stages, tags, duplicates and missing phone numbers
- [ ] Send the newsletter or a market update email
- [ ] Review action plans and automations, and pause any that no longer fit
- [ ] Post an update and photos to the Google Business Profile
- [ ] Weekly scorecard: new leads, conversations, appointments set and kept, by source

Monthly tasks

- [ ] Check-in calls or messages to past clients and sphere
- [ ] Track commissions and expenses for the bookkeeper
- [ ] Report on lead sources: cost and appointments per source
- [ ] Refresh the listing presentation and buyer packet
- [ ] Send birthday and home-anniversary messages from the database
- [ ] Ask recent closings for a Google review

For every new listing

- [ ] Collect seller documents, disclosures and HOA or condo information
- [ ] Book photography, video, floor plans and staging
- [ ] Order the sign, lockbox and print materials
- [ ] Prepare MLS input and photos for the agent's approval
- [ ] Draft the listing description and feature sheet
- [ ] Create just-listed social posts and the email blast
- [ ] Set up the showing service and showing instructions
- [ ] Schedule open houses and order open-house materials

For every transaction

- [ ] Open the file and build the contract timeline
- [ ] Send intro emails to clients, lender, title and the other agent
- [ ] Track every contingency deadline in the calendar
- [ ] Collect signatures and documents and upload them to the transaction platform
- [ ] Schedule inspection, appraisal and final walk-through access
- [ ] Send clients a status update every week until closing
- [ ] Run the broker compliance checklist before closing
- [ ] Arrange the closing gift and ask for a review after closing

Keep with the licensed agent

- [x] Pricing advice and opinions of value
- [x] Negotiating offers, terms and commission
- [x] Explaining or interpreting contracts
- [x] Showings and open-house discussions about the property (unless the assistant is licensed)
- [x] Anything your state or brokerage reserves for licensees

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General guidance; rules vary by state and brokerage.