

THE ULTIMATE REAL ESTATE

VIRTUAL ASSISTANT TASK CHECKLIST



POWERED BY PRIME REMOTE GROUP

A COMPREHENSIVE, PRACTICAL GUIDE FOR REAL ESTATE PROFESSIONALS LOOKING TO SCALE SMARTER BY DELEGATING THE RIGHT TASKS TO A DEDICATED VIRTUAL ASSISTANT (VA) THROUGH PRIME REMOTE GROUP.



Lead Management, CRM, and Marketing Support

How Prime Remote Group Supports You

At Prime Remote Group, we provide trained, real estate-focused Virtual Assistants who work as an extension of your business. Our VAs help you reclaim time, stay organized, and scale sustainably, without the overhead of in-house hiring.

A. Lead Generation & Prospecting Support

- Research and build targeted buyer, seller, and investor lists
- Scrape and organize property owner data from public sources
- Identify FSBO (For Sale By Owner) and expired listings
- Qualify inbound leads based on set criteria
- Tag and segment leads according to interest, location, and readiness
- Upload and maintain lead databases
- Monitor lead sources and report performance

B. CRM Management & Data Hygiene

- Set up and customize CRM pipelines
- Input new leads and contacts accurately
- Update contact records after calls, emails, and showings
- Remove duplicates and outdated contacts
- Assign tasks and reminders for follow-ups
- Track lead status and movement through the pipeline
- Generate weekly and monthly CRM reports

C. Email & SMS Follow-Ups

- Create and manage automated email sequences
- Send personalized follow-up emails
- Schedule and send SMS reminders
- Monitor replies and flag hot leads
- Clean and organize email lists
- Manage unsubscribe requests and compliance

D. Social Media & Digital Marketing Assistance

- Schedule social media posts (Facebook, Instagram, LinkedIn, TikTok)
- Repurpose long-form content into short-form posts
- Upload property listings with captions and hashtags
- Respond to basic comments and inquiries
- Track engagement metrics
- Coordinate with designers for branded graphics



Listings, Transactions, and Client Coordination

E. Listing Management

- Prepare listing descriptions and property details
- Upload listings to MLS and other platforms
- Update listing status (new, under contract, sold)
- Coordinate professional photos, videos, and virtual tours
- Ensure listing accuracy across all platforms
- Monitor listing performance and inquiries

F. Transaction Coordination

- Prepare and send contracts for signatures
- Track deadlines and contingencies
- Maintain transaction checklists
- Organize documents in shared folders
- Coordinate with lenders, inspectors, and escrow officers
- Follow up on missing paperwork
- Provide transaction status updates to agents

G. Client Communication & Scheduling

- Schedule property showings and inspections
- Confirm appointments with buyers and sellers
- Send calendar invites and reminders
- Answer general client inquiries
- Prepare welcome packets for new clients
- Send thank-you messages after closings

H. Documentation & Compliance Support

- Organize contracts and disclosures
- Maintain digital filing systems
- Ensure documents are signed and stored properly
- Assist with compliance checklists
- Prepare audit-ready transaction files



Operations, Admin, and Business Growth Tasks

I. Administrative & Back-Office Support

- Manage inbox and calendar
- Data entry and document formatting
- Create standard operating procedures (SOPs)
- Prepare presentations and reports
- Manage contact databases
- Coordinate internal tasks with team members

J. Marketing & Brand Growth Support

- Update website listings and blogs
- Upload testimonials and reviews
- Request reviews from past clients
- Manage email newsletters
- Track marketing campaign performance
- Assist with open house promotions

K. Financial & Reporting Assistance

- Prepare basic expense reports
- Track commissions and closings
- Reconcile simple spreadsheets
- Organize invoices and receipts
- Generate productivity and performance reports

L. Post-Closing & Retention Tasks

- Send closing gifts and cards
- Update CRM post-transaction
- Add clients to long-term nurture campaigns
- Schedule annual check-in reminders
- Manage referral tracking

M. Scalability & Growth Support

- Identify process gaps and inefficiencies
- Suggest automation opportunities
- Assist with hiring coordination
- Support expansion into new markets
- Maintain business dashboards



Why Work With Prime Remote Group?

Prime Remote Group specializes in providing dedicated, managed Real Estate Virtual Assistants for agents, brokers, and real estate teams worldwide. We focus on long-term partnerships, clear communication, and performance-driven support.

Whether you're a solo agent or a growing team, our VAs help you focus on closing deals while we handle the back-end.

Final Note:

A skilled Real Estate Virtual Assistant doesn't just save you time, they help you build consistency, improve client experience, and scale your business without burning out. By delegating the right tasks, you stay focused on what matters most: closing deals and growing your real estate brand.

This checklist can be customized based on your market, team size, and business goals.



PRIME
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Ready to Take Back Your Time?

If you're spending more hours managing admin, follow-ups, and systems than closing deals, it's time to delegate.

Prime Remote Group connects real estate professionals with dedicated Virtual Assistants who handle daily operations, marketing support, and client coordination, so your business can grow without burnout.

Start building your remote team today.

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