

Every task here can be owned by an assistant. Hand over one area at a time rather than the whole list at once, and write down what "done" looks like before you hand anything over.

LEADS

- ☐ Log and update contacts in the CRM
- ☐ Send routine follow-up emails and reminders
- ☐ Screen and route incoming inquiries
- ☐ Verify buyer pre-approval letters with the lender (if applicable)
- ☐ Request and track client referrals

CLIENT EXPERIENCE

- ☐ Coordinate logistics for client appreciation events (if applicable)
- ☐ Send recurring database follow-up touches (birthdays, home anniversaries)
- ☐ Send holiday and milestone cards to past clients
- ☐ Schedule recurring check-in calls with active clients
- ☐ Send post-closing thank-you note and review request

LISTINGS

- ☐ Order photography, video, and floor plans
- ☐ Draft listing description and enter into MLS
- ☐ Order yard sign and lockbox install (if applicable)
- ☐ Compile and organize disclosure documents
- ☐ Pull comparable sold listings and market data for the CMA
- ☐ Verify HOA documents, bylaws, and annual fees (if applicable)
- ☐ Research average utility costs for buyer questions
- ☐ Measure the property and record room dimensions
- ☐ Order a seller's home warranty (if applicable)

MARKETING

- ☐ Design flyers and listing brochures
- ☐ Schedule social media posts
- ☐ Manage paid ad campaigns (if applicable)
- ☐ Update agent website and listing feeds
- ☐ Design and send "just listed" and "just sold" postcards
- ☐ Write and schedule email newsletter campaigns
- ☐ Maintain and post to the agent's blog (if applicable)

SHOWINGS

- ☐ Schedule showings and send confirmations
- ☐ Host open house and collect sign-ins (if applicable)
- ☐ Send showing feedback requests to agents
- ☐ Compile and share showing feedback with the seller
- ☐ Prepare showing packets and property flyers for tours

CONTRACT

- ☐ Track deadlines and contingencies
- ☐ Submit contract paperwork to the broker
- ☐ Coordinate inspection and appraisal scheduling
- ☐ Follow up on loan and financing conditions (if applicable)
- ☐ Request and deposit the earnest money check
- ☐ Draft escrow instructions (if applicable)
- ☐ Confirm licensed contractors for agreed repairs (if applicable)

CLOSING

- ☐ Confirm closing date and time with all parties
- ☐ Follow up with the closing attorney or title company on documents
- ☐ Resolve minor title issues before closing (if applicable)

- ☐ Review closing figures for accuracy
- ☐ Order and send closing gift (if applicable)
- ☐ Request review and archive client file

BUSINESS DEVELOPMENT

- ☐ Maintain the vendor and professional contact list
- ☐ Research local market trends and pricing reports

