

# THE ULTIMATE GUIDE TO USE A REAL ESTATE VA

## 250+

^^ That's the number of Real Estate VA's we have placed with Real Estate Agents just like you in 2020.

What's up, it's Justin Nelson, & I am the founder of Sphere Rocket Real Estate Virtual Assistants! I also run one of the largest [Real Estate VA Facebook Groups](#) with FREE Trainings each week.

We're currently help 30-40 Real Estate Agents per month find hire and train a perfect Virtual Assistant at \$3-\$8 per hour...

... and what's interesting about what we're accomplishing is: We're breaking every rule that every mainstream "Real Estate VA Company" proclaims when it comes to hiring and training a Rock Star VA. We do Real Estate VA's Differently

And more importantly, the way we do VA's... works. If you're a Real Estate Agent/Mortgage Broker/Title Rep or anyone in the real estate industry & you'd like to hire and train a VA for \$3-\$8 per hour we have the system

... that allows you to hire and train a dream VA that gives you time back ...

... while building your business with high profitability...

... read every word of this guide, as it just might be the single most important "freebie" you've ever downloaded.

Let's get to it.



# THE ULTIMATE GUIDE TO USING A REAL ESTATE VA

Hiring and Training a Real Estate Virtual Assistant comes down to you having & implementing these 3 pillars:

**Pillar #1.) Hiring**

**Pillar #2.) Delegation**

**Pillar #3.) Continued Coaching and Education**

When each of these 3 pillars are done right inside of your business, your VA can become a powerful leverage machine for you.

You ready to dive in?

We'll start with...

## **PILLAR #1.**

### **Hiring.**

The mainstream group advice is that you should wait until you can afford a "\$30,000 - \$50,000 to hire an admin"

Which we think is silly.

I suppose it's good advice if you're looking to delay getting help in your business (if you're reading this...most likely you have a feeling of overwhelm or maybe even burnout in your business"

... slinging paperwork, managing a database, managing clients, managing a clients etc can be exhausting....oh and don't forget about keeping a great social media appearance at the same time

... instead of actually building your business.



# **THE ULTIMATE GUIDE TO USE A REAL ESTATE VA**

**For us:**

**Hiring is the hardest part of finding a good VA...**

**... what we've found is that most people do the following to hire:**

**Post 1 - 2 ads**

**Get 10 people apply.**

**They get ahold of 4 of them.**

**They interview 3 of them (1 no shows)**

**Then they settle for a candidate that is "close enough"**

**Last month, we received over 2,000+ applications for VA's to work for our company.**

**(This month, well hopefully interview 1,000+ of them and our goal next month is to interview 1,500+ of them).**

**Some might think that's crazy.**

**The goal to hiring is having a pool of applicants to choose from that is longer than the line at the fast food drive through.**

**Out of those 2,000+ applications we only hired 35 of them last month.**

**... so only the cream of the crop made it**



# THE ULTIMATE GUIDE TO USE A REAL ESTATE VA

Which means for every 20 VA's we interviewed only 1 got hired

(Not bad, eh?)

And on top of that...

... the most beautiful thing about this volume of applications:

**IT'S PREDICTABLE.... the talent is top notch**

Now, of course, the question is: how?

Obviously, it's easy to spend thousands of hours to figure it out...

... but how do we predictably bring in a ton of applicants?

We'll get to that in just a sec...

But first.

Let's discuss...

## **PILLAR #2.**

### **Delegation.**

The mainstream group advice when it comes to delegation is to...

... "have them cold call for you and do ISA work."



# **THE ULTIMATE GUIDE TO GROW YOUR GROUP**

**And because of that advice, we see thousands of people fail with Virtual Assistants at other companies.**

**That's A LOT of BS.**

**Most likely your business isn't built on that...**

**Not only is hard to have someone else cold call for you...**

**(its even harder when you have never done it yourself)**

**... so we tell you to outsource EVERYTHING first that isn't lead generation.**

**Lemme' explain:**

**Even if we gave you a VA that killed it at setting appointments....**

**... could you even handle that much business?**

**Most likely not!**

**What we've found is:**

**When you delegate all the other tasks in your business first.**

**You will feel a true sense of freedom in your business.**

**Instead of lead generation, we create a high amount of leverage.**

**We have created a list of all the things we see our top clients have there  
VA do.**



# THE ULTIMATE GUIDE TO USE A REAL ESTATE VA

We have a formula we follow that allows us to figure out which tasks we need to leverage out first...

... but at the same time, frees out time to make more money.

We'll get into how that works shortly... but first, let's talk about:

## **PILLAR #3.**

### **Continuing Education.**

Most people who want a VA they fail at this one part.

They kinda' just "hope" the VA comes trained on everything.

They ask, does my VA know how to do everything I need them to know how to do?

The answer is training a Real Estate VA and saying they know everything.

Is just like you saying.....you took your licensing exam and then came out knowing everything.

Instead, our Real Estate VA strategy is built around consistently providing continuing education to our hired VA:

Making the training custom to our VA.

Every single day I sit on a 1 hour call coaching hundreds of Virtual Assistant owners and VA's.

Your VA needs a place they can go and ask questions and get training from

Because I know your market and schedule....you won't always have time to meet with them 1-2 hours per day....I get that



# THE ULTIMATE GUIDE TO USE A REAL ESTATE VA

There you have it. Those are the 3 pillars that have allowed us to scale our business to \$100k+/month with high profit.

So what's next?

Well, there's only so much we can explain about hiring and training a Virtual Assistant in a 10 page guide, so if you're happy with what you're reading so far, here's our next step:

[Join our free Facebook™ group](#) for Real Estate Agents who are exploring the idea of hiring a Virtual Assistant for their business!

Inside, we dive deeper into the 3 pillars of getting your time back and making more money with a Real Estate Virtual Assistant!

Plus - we host a free live stream every Wednesday @ 7pm EST...& we'd love to see you in there.

(You'll have the added bonus of being able to "spy" on our the way I manage over 20+ of my own Real Estate VA's)

[Tap here to join.](#)

See you inside.

- Justin Nelson

P.S. If you got value out of this guide, feel free to share it with friends and/or colleagues who would benefit from it.

## OH, AND CHECK OUT THE TOP 50 TASKS BELOW



A stylized graphic of a rocket launching from a globe. The globe is blue and green, representing Earth. The rocket is silver with red and orange flames coming out of its engine. The background is a cityscape with many skyscrapers, including the Empire State Building.

# **SPHERE ROCKET**

**TRAINING . MARKETING . LEVERAGE**





# Who is Sphere Rocket VA?

Sphere Rocket VA is a Virtual Assistant placement company that specializes in helping Real Estate Agents LIKE YOU get more leverage in their life and business. 90+% of agents when surveyed don't think it's possible for them to be able to afford a full time assistant. The secret sauce of Mega Agents for over a decade is the use of Virtual Assistants. You're able to get a Virtual Assistant from anywhere between \$3 - \$6 an hour that can do just about ANY TASK in your business.

The following document was created to get your brain churning on all the things that an assistant can do for you. The goal of you getting into business was most likely to build a better future for you and your family. We didn't get into this business to work 80+ hours a week and be stressed all the time. Check out all the things our VA's can do for you + many not even listed!

Join me on the journey below and see what we have done to help 100+ agents in just 2020 alone get their time back.

## ***Mission Statement:***

***Providing the necessity of leverage to all Real Estate Agents by providing a cost effective solution that Mega Agents keep secret***

**[www.SphereRocektVA.com](http://www.SphereRocektVA.com)**



## **Real Estate VA Tasks**

1. Listing Input
2. Listing Marketing
3. Showing Feedback Tracking
4. Pre-Listing Packet Creation
5. Listing Presentation Updates
6. Post Appointment Notes/Gifts
7. Managing a Brand Kit
8. Transaction Management
9. CRM Management/Clean Up
10. Facebook Data Scrape
11. Quarterly Check In Calls
12. Warm Lead Follow-Up
13. Daily Task Reminders
14. Schedule Management
15. Coordination of Lock Box Set-Up and Tear Down
16. Client Event Coordination
17. Talent Recruitment & Pre-Screening
18. Facebook Ads
19. Facebook Business Page Management
20. Instagram Page Management



21. Email Management
22. Gathering Client Reviews
23. Birthday Shout Outs
24. Profile Updating
25. Agent Referral Monitoring
26. Internet Lead Auditing / Reach Manager
27. Skip Tracing
28. Video Editing
29. Budgeting
30. Book-Keeping
31. Receipt Storage
32. Creating ASANA Team ONBOARDING
33. Inbound Phone Calls
34. Sign Call Lead Generation
35. Weekly Seller Updates
36. Manage your personal life
37. Growing Instant Following
38. Running Your LinkedIn
39. Running a VIP Facebook Group
40. B2B Appointment Setting



41. Daily Appointment Confirmations
42. Property Management Coordination
43. Facebook Ads
44. Monthly Market Update Video Blasts
45. Managing Your Vendor List
46. Cold Social Media Messaging
47. Building Agent to Agent Referral Network
48. Scheduling Showings
49. MLS Buyer Engine Initial Set Up
50. Finding Open Houses



## **CASE STUDIES**



This is just a small list of things we routinely see agents in the industry implement with a Real Estate Agent Virtual Assistant for.



## Sphere Rocket VA

Below is a list of systems that we see our Sphere Rocket Members use their VA to help them execute on

- Boomtown
  - CINC
  - KW Command
  - KVCore
  - Ylopo
  - Real Geeks
  - Ring Central
  - Google Voice
  - Canva
  - Mojo
  - Chime
  - EXP Enterprise
  - CTE
  - Trainual
  - Chime
  - Dotloop
  - DocuSign
  - Zipforms
  - MLS
  - Slack
  - CTME
  - SISU
  - LastPass
  - WorkPlace
  - Trello
  - Slack
  - Zoom
  - Streamyard
- +50 More

# 1) LISTING INPUT

## Task Overview

1. Step #1 is for team leader to use **screen-cast-o-matic** or **loom** software to screen record their screen of them entering a real listing based on a standardized reference document. A standardized listing input document is a document that the agent will fill out each and every time they get a new listing so that the VA can transcribe all the details into the MLS.
2. Step #2 is the Team Leader needs to fill out a standardized reference document and have the VA do a test listing input. This listing will not go live, but will allow the VA to learn the system and find any issues. Have VA also upload all pictures of the fake listing as well.
3. Step #3 Provide the VA your past 10 listing descriptions and have them practice coming up with them on their own. The first few most likely will be nothing like what you want. Listing descriptions is a skill they will learn over time!

## Resources

1. **Standardized Document Example**
  - a. <https://iresis.files.wordpress.com/2020/07/residential-detached-input-form.pdf>
2. **You may have to make your own**
  - a. All you do is take all the spots in the MLS and turn it into a form. If you run a team this will make it standard for each time your team member needs a VA to input a listing for them.



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# EXAMPLE

**Energy/Green Information** (If \*Yes, Year Certified/Installed and Score are required. Documents verifying certification are also required and should be uploaded with this listing.)

Certifications:    HERS Rating:  Y /  N                      \*Year Certified: \_\_\_\_\_ \*Score: \_\_\_\_\_ (0-240)  
                          Home Energy Score:  Y /  N                      \*Year Certified: \_\_\_\_\_ \*Rating: \_\_\_\_\_ (1-10)  
                          ENERGY STAR® Qualified New Home:  Y /  N                      \*Year Certified: \_\_\_\_\_  
                          LEED for Homes:  Y /  N                      \*Year Certified: \_\_\_\_\_  
                          NAHB/NGBS-ICC 700:  Y /  N                      \*Year Certified: \_\_\_\_\_  
 Solar:                Solar PV:  Y /  N                      \*Year Installed: \_\_\_\_\_ \*Kilowatts: \_\_\_\_\_  
                          Solar Thermal:  Y /  N                      \*Year Installed: \_\_\_\_\_ \*Type: \_\_\_\_\_ (e.g. "Water")  
 \*Green Features Addendum uploaded?  Y /  N

## Association Information

\*Has an HOA?:  Y /  N If Yes, 1st HOA Name: \_\_\_\_\_ HOA Phone: \_\_\_\_\_  
 HOA Email: \_\_\_\_\_ HOA Website: \_\_\_\_\_ Has Covenants?:  Y /  N  
 \*Has Assn. Fee?:  Y /  N If Yes, \*Assn. Fee: \$ \_\_\_\_\_ per \_\_\_\_\_ \*Assn. Transfer Fee?:  Y /  N \* Assn. Reserve?:  Y /  N  
 2nd HOA Name: \_\_\_\_\_ HOA Phone: \_\_\_\_\_ HOA Email: \_\_\_\_\_  
 HOA Website: \_\_\_\_\_ Has Covenants?:  Y /  N Has Assn. Fee?:  Y /  N  
 If Yes, Assn. Fee: \$ \_\_\_\_\_ per \_\_\_\_\_ Assn. Transfer Fee?:  Y /  N Assn. Reserve?:  Y /  N

## Garage Information

\*# Spaces: \_\_\_\_\_ \*Garage Type:  Attached  Carport  Detached  None  Off Street  Reserved  Underground Garage SqFt: \_\_\_\_\_

## Square Footage Information

\*Main: \_\_\_\_\_ Upper: \_\_\_\_\_ \*Finished SqFt (exclude Basement): \_\_\_\_\_ SqFt Source:  
 Lower: \_\_\_\_\_ Addl. Upper: \_\_\_\_\_ \*Finished SqFt (Include Basement): \_\_\_\_\_  Licensee  Prior Appraisal  
 \*Basement: \_\_\_\_\_ \*Total SqFt (Fin & Unfin Inc. Basement): \_\_\_\_\_  Building Plans  Assessor  
 Other

## Room Information

Rooms	*Dimensions (LxW)	*Level	*Floor Covering	Level Options: Main, Upper, Lower, Basement, Addl. Upper	*Total # Bdrms: _____ *All Bdrms Conform: <input type="checkbox"/> Y / <input type="checkbox"/> N
Living Room	_____ X _____	_____	_____	Floor Covering Options: Brick, Bamboo, Carpet, Cork, Laminate, Other, Tile, Vinyl, Wood	* Total # of Bathrooms: _____ # Rough-in baths: _____
Dining Room	_____ X _____	_____	_____		
*Kitchen	_____ X _____	_____	_____		
Great Room	_____ X _____	_____	_____		
Family Room	_____ X _____	_____	_____		
Rec Room	_____ X _____	_____	_____		
*Laundry Area	_____ X _____	_____	_____		
*Master Bdrm	_____ X _____	_____	_____		
Bedroom 2	_____ X _____	_____	_____		
Bedroom 3	_____ X _____	_____	_____		
Bedroom 4	_____ X _____	_____	_____	Baths    Bsmt    Lower    Main    Upper    Addl	
Bedroom 5	_____ X _____	_____	_____		Full Baths _____
Bedroom 6	_____ X _____	_____	_____		3/4 Baths _____
Study/office	_____ X _____	_____	_____		1/2 Baths _____

## Remarks (limited to 1000 characters for Listing Comments and Broker Remarks)

Listing Comments (Describe the property. Will display on reports and be sent to ColcProperty, MySite, and all other public websites): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 Broker Remarks (Private information for other brokers only-- e.g. commission info, bonuses, etc. Will display on IRESis & printed agent version reports only): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

# 2) NEW LISTING MARKETING

## Task Overview

1. Step #1 is to determine the 8-10 things you want every listing to have and standardize the templates. Team Leaders - it's a smart idea for you to spend the 1-2 hours to help build these 10 templates as its your brand and style. But now that you have a Sphere Rocket VA, once you spend those 1-2 hours, you will never have to think about it again. Just get the listings and know the marketing will be on point.

### **Example Marketing Stack:**

- #1 Just Listed FB Post
- #2 Just Listed Instagram Post
- #3 Open House Flyer
- #4 Open House FB Post
- #5 Open House Instagram Post
- #6 Under Contract FB Post
- #7 Under Contract Instagram Post
- #8 Video Slideshow Software

Let's say you just listed **345 Monroe Street, Berthoud, CO 80513**

2. Step #2 VA is to take all the pictures and information from the MLS listing for **345 Monroe Street, Berthoud, CO 80513** and input it into the 8-10 templates. Repeat for every listing

## Resources

- 1. Learn how to use Canva.com for static templates
- 2. <https://animoto.com/business/real-estate-videos>



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## Task Overview

# 3) SHOWING FEEDBACK TRACKING

1. This task is designed to help Real Estate agents stop having to track down every single showing feedback on their own. The reality is buyer agents are getting lazier and its costing your PRECIOUS TIME. This task isn't a task that is like hours of your time in a row, but it's the sporadic sellers always asking what the feedback is for their property.

### Step #1

- Create a Spreadsheet that has tab for each and every ACTIVE listing. Each time a new listing is scheduled, VA is to take that showing data either from showing system (Like CSS, Showing time etc) or just from email notifications and transcribe into a spreadsheet.
- On the spreadsheet make the following rows.
  - Showing Date
  - Showing Time
  - Showing Agent First Name
  - Showing Agent Last Name
  - Showing Property
  - Showing Agent Email
  - Showing Agent Phone #
  - Feedback Provided Yes or NO
  - Follow-Up #1 (48 Hours After) - Email Script
  - Follow-Up #2 (72 Hours After) - Text Script
  - Follow-Up #3 (96 Hours After)- Phone Script
  - Follow-Up #4 - (7 days ) - All 3 at same time!

Step #2 - Create a script for each follow up that your VA can do on your behalf

### Example:

Hey \_\_\_\_\_,

This is JUSTIN, Mike Davidsons Assistant and we wanted to follow up as we saw that you showed 123 Main Street at 1:30pm on 8/7/20 and wanted to get your feedback on the property.

Now all you have to do is check the spreadsheet and step in as needed! It's also a great idea for you to have your VA update your clients on feedback or lack of feedback.



# 4) LISTING APPOINTMENT PACKET CREATION

## Task Over-view

This one is a bit trickier depending on what your current process is. Sometimes an agent will always bring the same 10 things to a listing. **For Example:**

**#1 Old MLS Sheets**

**#2 Tax Records**

**#3 Comps**

**#4 School District Information**

**#5 Utility Sheet**

**#6 MLS Input Form**

**#7 Listing Agreement Pre-filled with Clients Information**

**\*Every Person Does the Above Different\***

The whole goal with this is to create a 1 hour video of you assembling a package that you would take on a listing with you and show the VA how to pull the information for each. So the process should look like this after you complete the training!

**Step #1** - Send your VA an email with the property address and names of the owners and time of appointment so they know the deadline to get you these documents.

**Step #2** - VA to assemble all 7 documents based on YOUR VIDEO training provided and once done, the VA is to send them all as attachments to your email. This allows you to just be able to waltz in and print out everything. Obviously some things you may still have to edit, review, or do yourself like comps, listing docs creation (depending on state etc). But now at least 80+% of it is sitting in your email ready to go and be printed. You don't realize how much time you spend document gathering if you take 2-3 listings a month and have a handful of buyers. IF YOU OWN A TEAM: Could you imagine the value you could add to your team members if every time they had a upcoming listing appointment, all they had to do was submit an address and name and then magically got 90+% of the information they needed emailed back to them?



# 5) LISTING PRESENTATION UPDATES

## Task Overview

1. This is a really quick and easy one if you're a Solo agent. We highly suggest you shoot a video walking your VA through your listing presentation. Especially if it's a powerpoint of some kind. Then, if you ever need to make changes to your listing appointment presentation, you can send this to your VA to do for you. Whether it's updating market stats etc.

### ***IF YOU RUN A TEAM***

Your team is your brand. One thing I know you like is consistency. If your VA knows exactly how your Listing Presentation and Buyer Presentations work, each time a new team member joins your team, your VA can copy your template (That you know works) and can go in and create that agent a stellar listing and buyer presentation with their custom logos, branding and pictures. Here's the reality, when you have a new agent join your team they are getting a fire hose of information. Agents are also known for spending HOURS on making their picture fit right on a presentation to distract themselves from having to lead generate. So take this off their plate.

Step #1 - Create Standard Listing Presentation

Step #2 - Create Standard Buyer Presentation

Step #3 - Teach Your VA how the presentation works and what will need changed

Step #4 - Test Your VA by giving them fake person to onboard



# 6) POST APPOINTMENT NOTES/GIFTS

## Task Overview

1. Here is the thing. You and I both know, handwritten notes after appointments with just about anyone is CRITICAL and could be a game changer in our business. Yet we don't do it, just because we get so busy. You walk out of lunch with a POWER PARTNER and your phone starts to ring off the hook and then the rest of the day spirals out of control. Well now your VA knows exactly who you had lunch with and guess what, they can send it as if its coming from you!

Step #1 - Create a SendOutCards.com Account

Step #2 - Design a Few Templates that fit "your style"

Step #3 - Come up with a system of how you're going to alert your VA that you want a new card sent out.

Step #4 - Test it out and have your VA send a card to one of your current power partners. This system costs pennies each month to get A LOT of quality content out to your partners without ever having to go to the post office or having to do it yourself.

## Resources

1. [www.SendOutCards.com](http://www.SendOutCards.com)



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# 7) MANAGING A BRAND KIT

## Task Overview

One of the most fundamental foundations of being able to constantly create good marketing material and have a consistent brand is to have a great brand kit. The best place we have found to store a brand kit is in a google drive folder. No more having to search high and low for your headshots, logos etc. Our VA's manage our Brand Kits. Our Brand Kits consist of STANDARD and NON-STANDARD ITEMS. This can be duplicated for each agent on your team. If you have a large team, you know the headache of having everyone's information in one place.

**Standard Item** - Something that will be used over and over again

**Non Standard Item** - Material for one time use or specific marketing campaigns

Step #1: Create a Folder & Share it with your VA and Put the Following Standard Items In It

- Your Bio
- Your Headshot
- Your Company Logo
- Your Personal Brand Logo
- Your Email Signature
- Instagram Name
- Facebook Name

Step #2: Create a Folder called "Non - Standard Brand Kit"

- This is where after a closing, you put closing photos
- Photos of you doing things during your day
- Photos of you meeting business partners etc.
- Anything you take a picture of that could be used for social media, put it here immediately. It is hard for an assistant to build social media if you don't provide them any content.

## Resources

<https://www.remove.bg/>  
[www.canva.com](http://www.canva.com)



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# 8) TRANSACTION MANAGEMENT

## Task Overview

So the transaction process of Real Estate is NOT usually the first process that an agent should hand off to a VA, because you have 30+ hours of things that you're doing that could be handed off easier than TC work. However, we work with some just amazing people who have the dedication to make TC hand off work possible. So if you're looking to hand off TC work to whether its an in person admin VA, just know this process takes time and system building on your part. Every part of the country has a different process. Those who are able to leverage TC work will experience and UNBELIEVABLE amount of leverage and time back. I am not going to write a one pager on how to hand over transaction coordination as its so different for each and every agent/team/market. However I am going to provide the top 20 things we see a VA do in a transaction:

- #1 Listing Input
- #2 Coordination of Staging
- #3 Coordination of Photographer
- #4 Compilation of Offers
- #5 Compliance Checks on Documents, Signatures etc
- #6 Send First Step Email to Buyers/Sellers After Executed Contract
- #7 Inspection Coordination
- #8 Appraisal Coordination
- #9 Opening Escrow
- #10 Keeping Agent in Front of Deadlines
- #11 Tracking Down Signatures
- #12 Scheduling Closing Times
- #13 Closing Out File and Submitting to Brokerage for Commission Payout
- #14 MLS Update of Transaction
- #15 Add Clients to Post Closing Past Client Campaign/Database
- #16 Sending Closing Gifts
- #17 Gathering Client Reviews
- #18 Gathering Client Surveys
- #19 Sending Clients all Closing Documents
- #20 Closing Out File For Agent

**I Know you have about 20+ More Things the VA could do in your transaction for you**

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# 9) CRM MANAGEMENT/CLEAN UP

## Task Overview

So the cat is out of the bag, there are 100+ Real Estate CRM's out there and here is the brutal reality, NONE OF THEM WORK if you don't have solid data to go into them. So prior to even teaching our VA's how to use our CRM specific system, we do a export of all the data into an old fashioned spreadsheet to see where we're missing gaps. You will see on the next page the benefit of using a spreadsheet export. When you're in a CRM, you typically have to click on each profile to see what is missing and it's hard to actually get a read on what you have and don't have for the entirety of your database. This task alone, could take your VA's WEEKS AND WEEKS or MONTHS!

That excites me. If a VA, at \$3-\$6 an hour, can spend weeks and months on improving my database, I know I am gaining on or rocketing past my competition. I mean if I went from a 20% filled database to a 75% filled database, the chances of doing 10+ more deals a year from it exponentially increases.

*"A quality database is not something many have, because it takes not just a few hours, but 10,000 hours"*  
- Justin Nelson, Sphere Rocket CEO

**Step #1** - Form a Spreadsheet Template that has all the data fields you want the VA to have on every single person in your CRM

**Step #2** - Make a tab for every team member you want the VA to help find information on.

**Step #3** - Export data into spreadsheet and find all the missing spots

**Step #4** - Equip the VA with Email/Text/Social Media scripts to reach out to all of the contacts based on the information provided to attempt to get the other data points

**Step #5** - Check in often with your VA to find the struggle points of finding the data or handling objections from people asking why you need the data.

**Step #6** - Remember this is going to take a TON of time because a quality database that is worth owning is not easy to get.

**Step #7** - You can never expect an assistant to know how to do something you don't know how to do, so we suggest you do the first 50 contacts, use the scripts and do the data searches. This will help you find the pain points your VA will come across and help solve them ahead of time.

# EXAMPLE SPREADSHEET

By using a spreadsheet to start, it is super easy to find the missing spots compared to viewing it in a CRM

Notes	Date Added	First Name	Last Name	FB Profile Link	Company Name	Address	City	Zip Code	
		Keith	Alba	https://www.facebook.com/keith.alba	Keller Williams	350 INDIANA ST BTE 300 GOLDEN,	CO, United States	\$80,401.00	Golden, CO
		James	Kim	https://www.facebook.com/jmkimrealestate	Keller Williams				Joppatowne, Maryland
		Kyra	Duffy	https://www.facebook.com/kyra.duffy.5	Keller Williams				Longmont, CO
		Morgan	Peterson	https://www.facebook.com/morgan.peterson.7185	exp realty	73 E 17th St, Idaho Falls,	ID, United States	\$83,404.00	Boise, Idaho
		Kym	Ward	https://www.facebook.com/profile.php?id=100007842588527	Century 21	4 Ashe St Johnson City,	TN, USA	\$37,004.00	Johnson City, TN
		Caressa	Cox	https://www.facebook.com/caressa.cox	Keller Williams				Longmont, CO
		Kandis	Sweeney	https://www.facebook.com/kandis.sweeney	Keller Williams				California
		Kris	Coquette	https://www.facebook.com/kris.coquette.9	Keller Williams	920 S Fry Rd Katy,	TX, USA	\$7,450.00	Houston, TX
		Heather	Moudry	https://www.facebook.com/heather.cassadara					Beauregard, CO
		Cynthia	Christensen	https://www.facebook.com/cynthia.christensen.98	State Real Estate	3601 STAGECOACH RD# 201 LONGMONT,	Colorado, United States	\$80,504.00	Mead, CO
		Chrissy	Storm	https://www.facebook.com/chrissy.storm	Independent Brokerage	280 CO-133Carbondale,	USA	\$81,623.00	Colorado
		Courtney	Jefellina	https://www.facebook.com/courtney.jefellina	exp realty	One Riverway, Ste 1700 Houston,	TX, USA	\$7,056.00	Houston, TX
		Cindy	Macdon-Stevens	https://www.facebook.com/cindy.macdon-stevens	Heritage Title				Denver, CO
		Garin	Clark	https://www.facebook.com/profile.php?id=100010664462485	First American	95 Regent Blvd Suite 200,	TX, USA	\$75,063.00	Dallas, TX
		Bryan	Baylon	https://www.facebook.com/profile.php?id=100055589	Keller Williams	95 W Happy Valley RdPhoenix,	AZ, USA	\$85,085.00	Phoenix, AZ, United States
		Dave	Zajdzinski	https://www.facebook.com/dave.zajdzinski	exp Realty	90 E Rio Salado PkwyTempe,	AZ, USA	\$85,261.00	Mesa, AZ, United States
		Meghan	Kelly	https://www.facebook.com/meghan.kelly.realtor	Keller Williams	6140 Tuft Blvd Ste 100, Colorado Springs,	CO, United States	\$80,023.00	Colorado Springs, CO
		Aline	Roy	https://www.facebook.com/aline.roy.35	Alma Realty Merrimack Valley				Lowell, MA, United States
		Josh	Hunter	https://www.facebook.com/josh.hunter	Longhorn Realty	600 5th Ave Longmont,	United States	\$80,501.00	Longmont, CO
		Luis Irizarry	Jr	https://www.facebook.com/profile.php?id=17740751427	Freedom Mortgage Group LLC	24275 Katy Fwy #400, Katy,	United States	\$77,494.00	Katy, Texas
		Kelley	Clayton	https://www.facebook.com/kelley.clayton	exp realty	3150 N Elm St, Suite 201 Greensboro,	NC, United States	\$27,408.00	Burlington, North Carolina
		Christopher	Roybal	https://www.facebook.com/christopher.roybal	Licensed Agent				Houston, Texas
		Kate	Fey	https://www.facebook.com/kate.fey.211	exp realty				Longmont, Colorado
		Troy	Corbin	https://www.facebook.com/troy.corbin	Catalina Wine Mixer				Louisville, Kentucky
		Kevin	Corrao	https://www.facebook.com/kevin.corrao.12	Keller Williams	865 Rogers St, Lowell,	MA, United States	\$1,852.00	Lowell, MA
		Brenda	Cunwick	https://www.facebook.com/brenda.cunwick	Keller Williams Arizona Living Realty	This page isn't available			Kingman, Arizona
		Tiffany	Moore	https://www.facebook.com/tiffany.moore.18400	Keller Williams	11400 Parkside Dr #120Knoxville,	TN, USA	\$37,934.00	Kingston, TN

If you run a team, this is a great way to take some of the tasks off your agents' plates, so they can lead generate and you have control of growing their database at \$3 per hour!

» SCHEDULE A FREE STRATEGY SESSION «



# 10) FB DATASCRAP

## Task Over-view

1. Why do Real Estate Agents have Facebook Accounts that look like this?

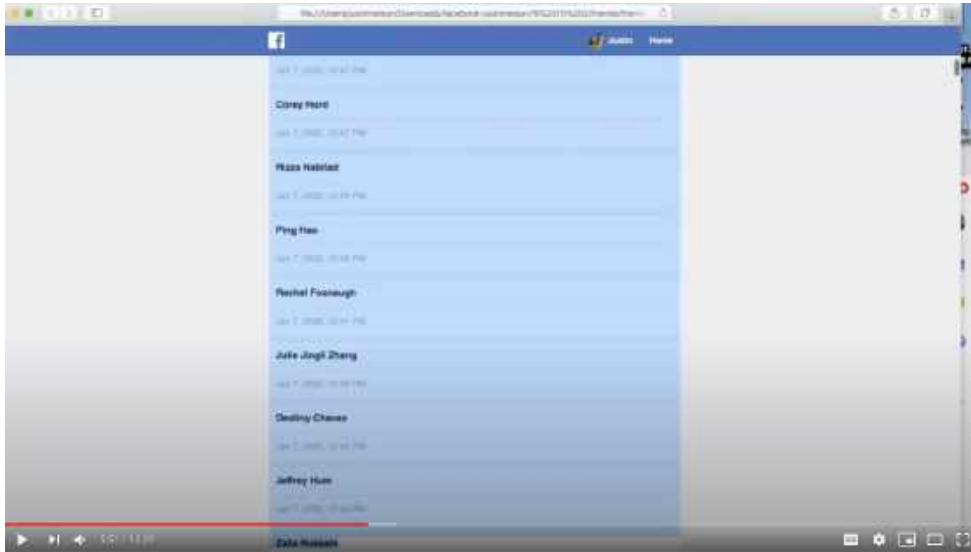


We have hundreds and thousands of friends on Facebook yet our database looks EMPTY!

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# TRAINING GUIDE

Watch this video below to have your VA make your friends list on social media turn into a MASSIVE DATABASE:



<https://youtu.be/oEt1beDkEdo>

**Also LIKE & SUBSCRIBE as we OFFER A TON OF TRAINING ON THAT CHANNEL!**

**Final Step:**

**YOU WILL NEED TO MAKE YOUR OWN SPREADSHEET as the one mentioned in the Video is no longer in operation**

**ALSO YOUR FRIENDS LIST MUST BE VIEWABLE**

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# 11) QUARTERLY CHECK-IN CALLS

## Task Overview

We love to have our virtual assistants check in with our database on a quarterly basis. In order for you to do this, you need to properly integrate your VA into your team's branding culture. Whenever your Sphere Rocket VA joins your team, you want to email everybody and social media blast the new hire. This allows your database to learn a bit more about your new hire. Most agents who get a Sphere Rocket VA will give their VA the title of "Client Care Manager" as this, from the outside, makes it look like it's a client focused hire. So now, let's cut to the chase. You still need to call your SOI, don't be lazy. However with this added person you can now make more contacts per year.

**Step #1** - Determine which part of your database you want your VA calling and checking in on

**Step #2** - Record 25+ answered calls of you calling your SOI and checking on them.

**Step #3** - Create 3-5 scripts for your VA to use and check in with your clients on a quarterly basis! I would record these calls if your state allows you to. CallHippo.com is a great app for super cheap that can do this for you. This is for practice and is able to help your VA perfect the calls. THESE ARE NOT COLD CALLS. Just check in calls, no different than when your dentist calls to check in on you every 3-6 months.

### Example Script:

Hey is this \_\_\_?

Yes!

Awesome, this is Mary with the Joe Smith Real Estate Team and I just wanted to call and check in on you as Joe was out of the office today and he just wanted me to check in with your family.

## KEEP IT SIMPLE

*Don't Overthink this, it's probably 10x what you're already doing right now with quarterly calls*



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# 12) WARM LEAD FOLLOW-UP

## Task Overview

Have you ever been running from appointment to appointment or showing to showing and you have referrals coming in left and right from all over the place? I know this is a major problem I faced and honestly I lost \$100,000+ over the years with this until I learned how to utilize my VA for this.

**Step #1** - Keep a WARM LEAD SPREADSHEET

**Step #2** - Screenshot or Text over ALL WARM leads/referrals etc. to your VA. Screenshot them to your VA anyway. Email, FB Messenger, Text ETC.

**Step #3** - Instruct your VA to remind you daily of all leads in that category

**Step #4** - Have your VA email you a top 20 warm lead summary daily

Example Email Template:

Here is a warm lead email update for you

#1 Joe Smith - 817-456-986 - joe@ets.com  
Last Note: call again no answer  
Date of Lead: 6/1/20  
Source: Referral From Jan Kroger

#1 Nancy Bob - 876-908-6758 - nancy@homesmith.com  
Last Note: call again no answer  
Date of Lead: 6/20/20  
Source: Referral From Justin Smith TN Real Estate Agent

**THIS TASK ALONE CAN GAIN YOU  
ONE MORE \$10,000+ CHECK PER  
YEAR THAT WOULD HAVE  
NORMALLY SLIPPED AWAY**



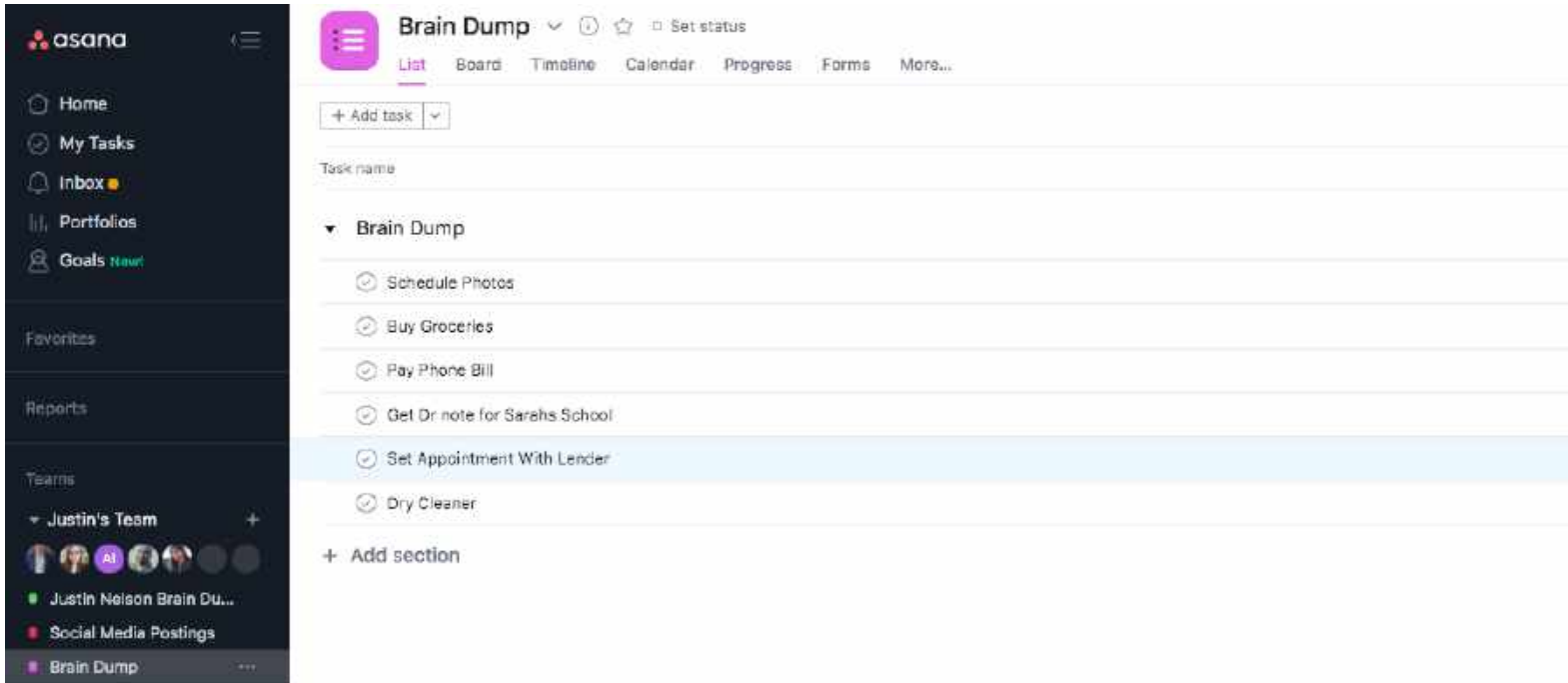
**SCHEDULE A FREE STRATEGY SESSION**



# 13) DAILY TASK REMINDERS

## Task Overview

This is SUPER SIMPLE! Find a way to brain dump your to-do list into a syncing platform. That way your VA can organize your thoughts for you and help you prioritize during meetings with your VA.



We use a system called **ASANA**. The mobile app is super easy to use, and if I put in a To-Do, I can even assign it to one of my team members so that it alerts them. This is a great way to keep track of all your tasks and have someone else watching and organizing them for you as you just dump them in there.

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# 14) SCHEDULE MANAGEMENT

## Task Overview

Again - another simple thing; however, the POWER of the following statements :

- I have CC'd my awesome assistant to find a time for us to chat
- Awesome, I am not sure of my schedule, can I have my assistant get with you?
- I don't think that time will work, can I have my assistant find a time that works for us both?
- Anytime you want a showing just email me and CC \_\_\_\_\_@gmail.com
- Anytime you see a house on your search engine that you want a showing on, text me and my awesome assistant at \_\_\_\_\_, and as a group we will find a time that works for us all and get them scheduled.

**Step #1:** Make sure your VA has a shared calendar access to your google calendar

**Step #2:** Get into the 21st century and burn the paper calendar that you're still on

**Step #3:** Give your VA a rundown meeting (and record it) of how you like your weeks to flow and what slots in your schedule are NO SCHEDULE zones

**Step #4:** Slowly start giving your VA leverage to put people on your schedule



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# 15) COORDINATION OF LOCK BOX SET-UP AND TEAR DOWN

## Task Overview

This is more of just an idea than an explanation! I didn't realize so many cities have companies that set up your lockboxes and signs for you and just store them in a storage unit. It is absolutely genius. So we see many people have their VA coordinate with these companies to get lockboxes setup or torn down. Also we see that many big teams have trouble tracking inventory and sometimes end up with a sign shortage because they're not monitoring a list of what gear is where. This is a great task for a VA to track in a spreadsheet. It sounds crazy maybe, but as you grow 5 lost boxes and 5 lost signs can be a \$1,000 bill at the end of the year. I mean that is a lot of new shoes and clothes worth of lost money!



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# 16) CLIENT EVENT COORDINATION

## Task Overview

Client Events can be the most foundational piece of any social agent's business. The hardest part is coordinating it and making sure it is all organized. Below is a check list of all the items your VA can take off your plate. We recommend that you write a process for each one of these steps. Once you do the first event with your VA, the rest of them just can follow the same system.

**Step #1** - Determine Who To Invite From CRM

**Step #2** - Set-Up RSVP System / Event Information Page (Recommend EventBrite)

**Step #3** - Create Facebook Page Event or Private Party Facebook Group

**Step #4** - Craft Messaging Campaign

- 30 Days Prior (Text)..*you need to make script for your VA*
- 21 Days Prior (FB Message)..*you need to make script for your VA*
- 18 Days Prior (Email Blast)..*you need to make script for your VA*
- 15 Days Prior (Phone Call Invite)..*you need to make script for your VA*
- 7 Days Prior to Event (Video Email Blast)
- 3 Days Prior to Event (Email and Text Blast)
- 1 Day Prior (Text)

**Step #4** - Craft To-Do List For Specific Event and Assign to Each Member

**Step #5** - Create Vendor Sponsor List

**Step #6** - Create Event Photo Folder

**Step #7** - Take Event Photos and have VA create Marketing Pieces

**Step #8** - Follow-Up with those that attended (Can be Agent or VA)

**Step #9** - Follow-Up with those who didn't attend (Can be Agent or VA)

<https://youtu.be/E5L-NYL1SXg>





# 17) TALENT RECRUITMENT & PRE-SCREENING

## Task Overview

This is one of my favorite tasks to use Virtual Assistants for. Whether you're growing your team or your brokerage or your company, using a VA to help recruit is critical. Now the VA is not going to seal the deal, but they're going to help you set the appointments and help screen out those who are not interested.

- **Step #1** Create Job Ad Template
  - Job Description/Duties/Roles Etc (Example on Next Page)
- **Step #2** Create a **calendly** account and attach it to your calendar
- **Step #3** Locate Recruiting Platforms
  - Indeed
  - WizeHire (My Favorite For Real Estate)
  - Craigslist
  - LinkedIn (Use ULINC Software) (Text 720-556-4218 for info)
- **Step #4** Create job ads and await for responses
- **Step #5** Once applicants come in, the VA needs to send a next steps email if you don't have automation in place. They can also text and call the same instructions. The instructions need to lead the applicants to the calendly webpage. Here is an example of one. Instructions is just a script that gets the applicant to go and schedule a time on the calendly page. If an applicant is unlicensed, most of the time team leaders have their VA assist them in getting licensed. If the agent is licensed, we need to get that person on a call ASAP with the team leader.

<https://calendly.com/sphererocket/pickjustinsbrainsessionunlicensed-agents>

<https://calendly.com/sphererocket/pickjustinsbrain>

I have these calendars set up and connected to my calendar. So it will only show times that are open on my calendar. I can also change my calendly settings to only take calls from 2pm - 6pm as the rest of my day is Real Estate Lead Generation.

The best way to find good real estate job ads is to scroll through the websites and duplicate the ones from successful teams in the nation. Rip off and duplicate :)



# 18) FACEBOOK ADS

## Task Overview

All Sphere Rocket VA's come equipped with a Social Media Real Estate Niche course that over 1,000 agents have taken across 35 states. As a part of this course, the Virtual Assistant learns how to run a few different Facebook Lead Ads. The most effective being...Just Listed....New Builds.... and Specific City Ads. These ads on average take about 30 Minutes to construct and the budget is up to you on each ad.

**Step #1** - You need to understand how FB Lead Ads work. How can you lead someone to a task when you have no clue how it works?

**Step #2** - Establish a Monthly Budget For Ad Spend

**Step #3** - Build the first ad with the VA based on training videos provided

**Step #4** - Connect the FB Lead Ads to your CRM. If you need help with this step, post in the Private Sphere Rocket VA Group Mastermind with what CRM you're using and someone can help you!

**Step #5** - Build a drip campaign in your CRM that auto starts when the leads come into it (With Texts, Emails & Phone Calls)

**Step #6** - Teach the VA how to respond to those text messages and provide them scripts and dialogue on how you want them to help you work the leads. The best convertor of leads will always be you. But when you're too busy, a VA's follow up work will always be better than your 0% follow up work.

## Resources

<https://www.socialrea.com/p/facebook-ads-101>

**Even if you don't have a Sphere Rocket VA and want Social Media Training, you may sign up for this at \$99 Per Month. Version 3.0 Launches August 10th, 2020**

# 19) FACEBOOK BUSINESS PAGE MANAGEMENT

## Task Overview

The #1 request we get is a VA that can do your social media for you! This is one of the easiest tasks to have your VA help you with. We break down Social Media Postings Into Three Categories:

### **#1 Standard Pre-Planned (These can be pre-planned out 365 Days)**

- Holiday Posts
- 3-5 Posts Per Week About Real Estate Specific Things
- 2-3 Posts Per Week About the Local Area ...(example: Things to do in Phoenix Arizona)

### **#2 Standard Non-Planned (These are triggered by an event but have standard templates)**

- Every time your team activates a listing, you make a 'Just Listed' post
- Every time your team gets a pending contract, you make an 'Under Contract' post
- Every time your team gets a closing, you post a closing photo
- Monthly Market Update Videos

### **#3 Personal Branding Pre-Built (These incorporate personal branding and pre-planning)**

- Inspirational Quotes with Your Photo
- Business Specific Templates About Real Estate
- Building Templates Out Premade Branding Templates

***Your Goal is to show your VA your style and then let them build a Content Calendar***

**MY FAVORITE PLACES TO GIVE MY VA ACCESS TO!**

[Ladies of Real Estate](http://www.lresocial.com)

[www.lresocial.com](http://www.lresocial.com)

[AgentCrate](https://www.agentcrate.com/)

<https://www.agentcrate.com/>

[Z51 Free Resources](https://z57.com/resources/free-real-estate-marketing-resources/)

<https://z57.com/resources/free-real-estate-marketing-resources/>

# EXAMPLE

## #1 Standard Pre-Planned (These can be pre-planned out 365 Days)



## #2 Standard Non-Planned (These are triggered by an event but have standard templates)

### For Example our open house template:

- [https://www.canva.com/design/DADsPElymXc/WbDEMSBqj1C5TYsX8Lamvw/view?utm\\_content=DADsPElymXc&utm\\_campaign=designshare&utm\\_medium=link&utm\\_source=sharebutton&mode=previe](https://www.canva.com/design/DADsPElymXc/WbDEMSBqj1C5TYsX8Lamvw/view?utm_content=DADsPElymXc&utm_campaign=designshare&utm_medium=link&utm_source=sharebutton&mode=previe)

### For Example our Just Listed template:

- [https://www.canva.com/design/DADulGoFbO0/\\_HkR0LpgGCsIsCbFC1Y3jw/view?utm\\_content=DADulGoFbO0&utm\\_campaign=designshare&utm\\_medium=link&utm\\_source=sharebutton&mode=preview](https://www.canva.com/design/DADulGoFbO0/_HkR0LpgGCsIsCbFC1Y3jw/view?utm_content=DADulGoFbO0&utm_campaign=designshare&utm_medium=link&utm_source=sharebutton&mode=preview)

## #3 Personal Branding Pre-Built (These incorporate personal branding and pre-planning)

### Steal My Template:

[https://www.canva.com/design/DAEARyCpyWM/NOcjv1A1NtSWc3VhcTG6zg/view?utm\\_content=DAEARyCpyWM&utm\\_campaign=designshare&utm\\_medium=link&utm\\_source=sharebutton&mode=preview](https://www.canva.com/design/DAEARyCpyWM/NOcjv1A1NtSWc3VhcTG6zg/view?utm_content=DAEARyCpyWM&utm_campaign=designshare&utm_medium=link&utm_source=sharebutton&mode=preview)

**\*This above template is just an example of how I can pre-make 200+ posts in seconds customized to my brand**







## **BONUS PAGE**

### Have Your VA Check Out These Pages

<https://www.propertyspark.com/40-real-estate-social-media-accounts-you-need-to-follow/>

<https://blog.homespotter.com/2020/01/08/best-real-estate-instagram-accounts/>

<https://www.realestateexpress.com/career-hub/grow-your-real-estate-career/follow-these-17-best-instagram-accounts-for-real-estate/>

<https://www.curaytor.com/7-Facebook-Pages-Worth-Stalking-and-the-Tools-to-Stalk-With>



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# 21) EMAIL MANAGEMENT

## Task Overview

This is one of my favorite subjects, because YOU SPEND TOO MUCH time in your email. 50+% of any email is usually spam. Any VA can spot the spam and put it into a folder for you!

**Step #1** - Use the system called *unroll.me* to get rid of all those unwanted subscriptions.

**Step #2** - Create a new folder called "needs to be sorted" and move EVERY SINGLE email from your inbox into your "needs to be sorted" folder. What this allows is for your inbox to go back down to 0 immediately and is a good baseline to start at with your VA.

**Step #3** - Create a document called "Email Rules". Then each day that your email is at 0, you need to go through all your emails and on the "Email Rules" start to dictate the flow of your emails. If you get an email from your Electric company and you want it stored in your "My Home" Folder then dictate that on the email rules folder. Now you can also use advanced sorting which gmail offers to do for you. You can make certain emails skip your inbox and go straight into folders. Just be careful with this tool as it will skip your inbox and sometimes you won't realize these emails you actually needed to see just disappeared straight into a folder. Email Management is not easy to pin down a process because everyone is so different, but this is a great way to start it.

<https://youtu.be/1bektidAlhk>

<https://youtu.be/CuTJRvjYzlQ>

# 22) GATHERING CLIENT REVIEWS

## Task Overview

I am just like you. The only reason I didn't get reviews from my past clients is I was too scared to ask, or I forget all together to do it. So guess what, I just have my Virtual Assistant to do it. My favorite way to do this is the following process:

**Step #1** - 5 Days Prior to closing we send the following email!

---

Hey \_\_\_\_,

We just wanted to say it has been an absolute pleasure to work with you and \_\_!

We're so excited for you to get all moved in!

I know you're about to be super busy with the move and I wanted to see if you could do \_\_\_\_ a quick favor and drop us a review about your experience with our team. Our business only continues to grow based on feedback from awesome clients like you. The two most popular places our clients validate who we are and what we do are **FACEBOOK AND ZILLOW**.

Here is a link to Facebook Review Page:

Here is a link to our Zillow Review Page:

I just want to say thank you in advance for letting us serve your family and know as your client care manager I am here for you now, in 3 months and for the entirety of the time you spend at \_\_\_\_ (Address)\_\_\_\_\_

Cheers Your Client Care Manager (Va Name)

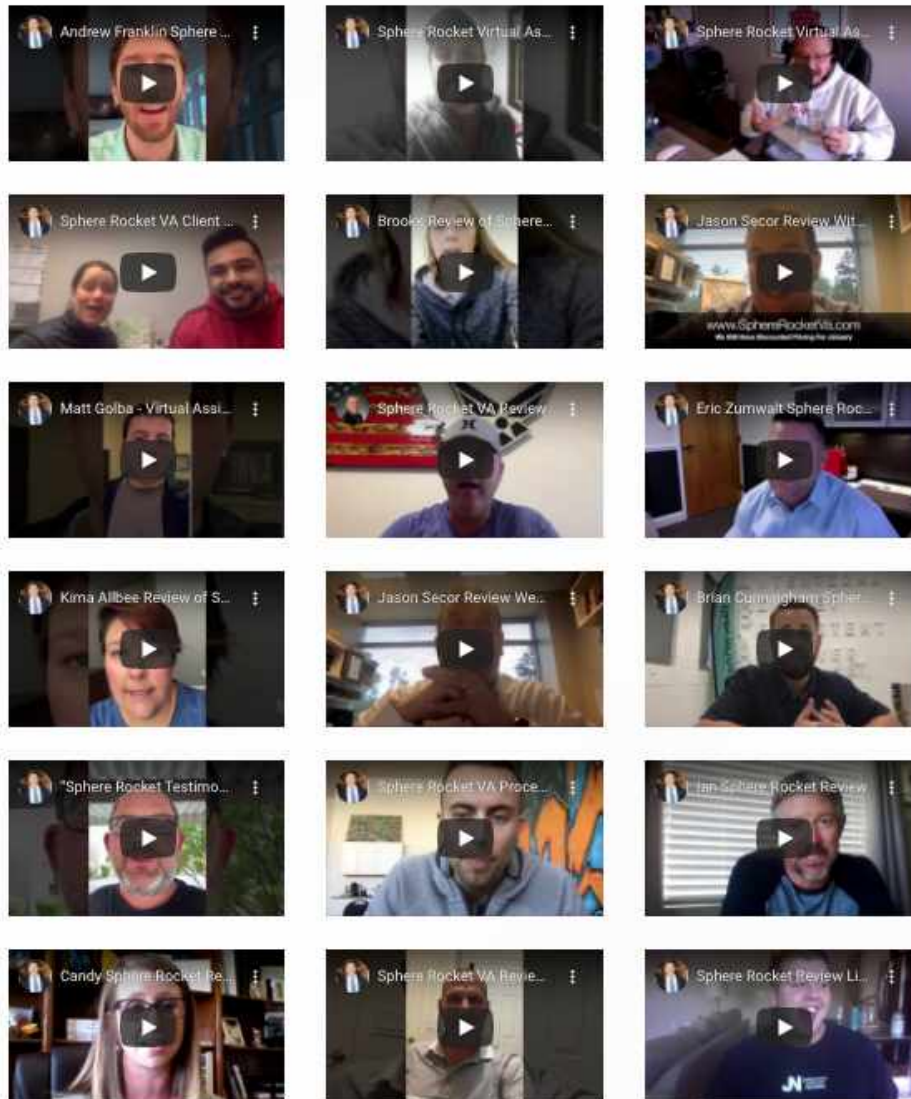
---

The day of closing the AGENT NEEDS TO ASK FOR A VIDEO REVIEW! Once they record it they need to drop it in a google folder labeled "Closing Video Reviews" If you're on a team, this is a great place for all agents to have access to!





# SPHERE ROCKET VA CLIENT REVIEWS



Above is a great example of the power of Video Testimonials. I have over 40+ Active Video Testimonials from clients on our websites. One of my favorite marketers once said:

"You don't need fancy marketing copy or gadgets, the thing that will sell your services more than anything is people who have used it and experienced its power"

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# 23) BIRTHDAY SHOUT-OUTS

## Task Overview

This is going to be another simple but super effective one! The steps are for your VA:

**Step #1** - Locate all Birthdays in Team Database

**Step #2** - Send Them all a SendOutCard.com card

**Step #2.5** Send them a Voicemail drop using slybroadcast coming from team leader's phone #

**Step #3** - Locate all Birthdays on Facebook by searching "Birthdays in search bar"

**Step #4** - Send them all a Video that has already been pre-recorded by your team leader. This is a 30 second generic happy birthday!

**Step #5** - Write Happy Birthday on their wall!

**Step #6** - Team Leader can take over any responses messages coming in.

The purpose of the VA in this task is just to send out the engagements on a consistent basis so you don't forget.

**ANYTIME A VA LOGINS TO YOUR FACEBOOK,  
THEY NEED TO BE USING NORDVPN.COM**

## Resources

1. Sendoutcards.com
2. Slybroadcast.com



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# 24) PROFILE UPDATING

## Task Overview

Using your brand kit you established in one of the previous tasks, you want your VA to do a bi-annual update of all your online accounts. Below are listed all of the online accounts that we suggest your VA be updating for you. The first time they try and access some of these, it's going to require security codes etc. so be patient. After the first time, they will be smooth sailing. Fill in the rest of the ones you can think of a VA doing for you:

- Realtor.com
- Zillow.com
- Trulia.com
- Your Brokerage Website Portal
- Creating a Google Business Page on Google Business
- Facebook Page Bio (address, website, location, hours, Phone)
- Instagram Page
- Your MLS Portal
- -
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**Estimated Time Saved: 1 Hour Per Agent On Your Team**

**Estimated Money Saved: YOUR HEADACHE**

# 25) AGENT REFERRAL MONITORING

## Task Overview

Ever wonder why some agents win all referrals in the referral groups? Well them having a VA may be apart of it. While this strategy isn't perfect, you can sometimes snap up an extra deal a year by having someone monitor these pages. Oh and there's one trick to them as well.

Here is a list of the a few of the top groups to watch. Each of your brokerages will have niche groups that are even more important for you to join!

### **Lab Coat Agents:**

<https://www.facebook.com/groups/LCAREferrals/>

### **Next Level Agents:**

<https://www.facebook.com/groups/456174884547059/>

### **Referral Group For Agents (Eddie Saeed Network):**

<https://www.facebook.com/groups/1094586194006045/>



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# 26) INTERNET LEAD AUDITING & REACH MANAGER

## Task Overview

If you run a team of 1 agent or 20 agents, you're most likely paying hard earned money on leads of some sort. The most popular is Internet leads. Because there are so many different CRM's and Internet lead programs, we're not able to provide exact training on how you should do the following; however, we can provide some ideas of what we see some teams use their VA's to track.

### **Things VA's Track For Lead Auditing**

- Create Daily Report of all Un-responded to Emails & Texts in Agents Accounts
- Track Initial Response Time (Aim to be under 5 Minutes)
- Track # of Call Attempts on New Leads In First 10 Days
- Track # of Text Attempts
- Track # of Notes Per Lead
- 

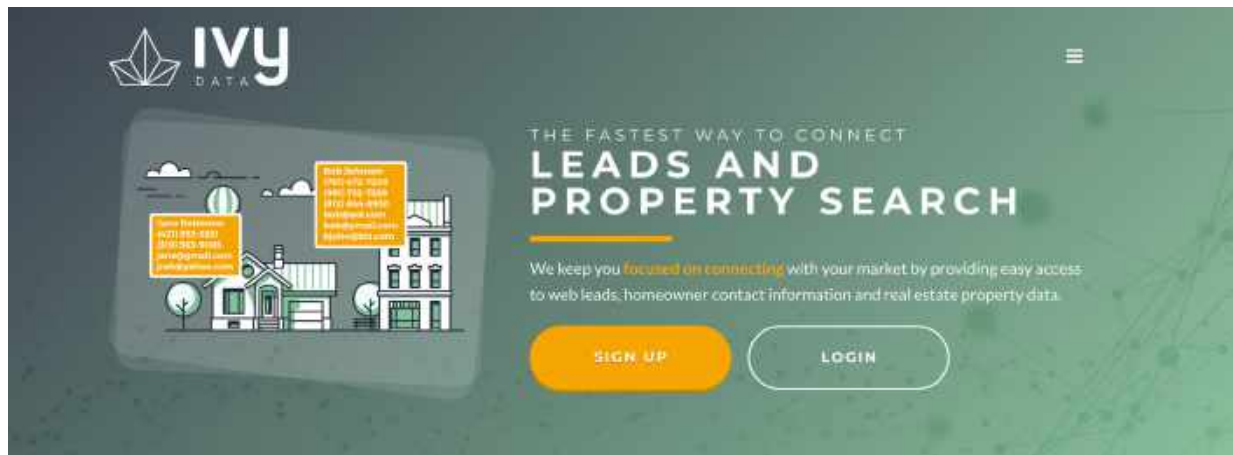


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# 27) SKIP TRACING

## Task Overview



If you ever need Skip Tracing done, this system is one of my favorites to use. Jump in it yourself and once you figure out how to use it (it is stupid simple), teach your VA how to use this to save time and money compared to many of the other expensive and clunky systems.

<https://www.getivydata.com/>

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# 28) VIDEO EDITING

## Task Over-view

Video editing takes a niche skill when it comes to multi-scene cuts, commentary, overlays, etc. If someone is looking for a VA to do more advanced Video Editing, then that is a job role that needs to be specified at the beginning of the process as we do have rock star talent in those areas. I wanted to drop some tools that we find super easy to use when it comes to Video Editing files online.

The #1 thing a VA can do is take your listing photos and turn them into an interactive video slideshow. Just doing this takes your business page to the next level. If you're doing market update videos etc, these softwares can do some cool things for the everyday VA, but if you're looking for more crazy video overlays and jump cuts etc, we will find you a VA with more advanced software.

**Veed.io**

**wevideo.com**

**Magisto**

**The below is my favorite**

**<https://www.flexclip.com/template/real-estate/>**



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# 29) BUDGETING

## Task Over-view

So depending on where you're in your business journey your VA may be a good fit to help you budget and help you do bookkeeping. If you're a solo agent and have never had budgeting or book keeping done before, you will be in heaven once you get a system down. If your business already has bookkeepers and automated financial expense tracking, I wouldn't disrupt the ecosystem of your business just to give your VA another task. Below is a screenshot of how we budget with our VA's. This is an example of them helping me with a personal budget. On the left you will see a monthly budget and then even more importantly you will see a sliding column where the VA will go in and report each month how much was spent on that category. Most banks have an accountant view only option which allows your VA to login and view accounts, but not transfer any money from them. Then each month they compile a list of let's say the 100 debits from your personal account and then assign them to the categories to rank where you spent in comparisons to the budget. **The biggest benefit for me in doing this, is not only for budget accountability but catching those pesky subscriptions that sneak up on ya for a few extra thousand a year. TRUEBILL IS AN APP YOU MUST CHECK OUT**

	A	B	C	D	E	F	G
	YEAR 2020	MONTHLY BUDGET/EXPENSES	AUGUST - July 26th	SEPTMEBER	OCTOBER	NOVEMBER	DECEMBER
Paycheck:		\$6,000.00					
Net Check		\$4,800.00	\$4,800.00				
Total Monthly Budget		\$4,800.00					
<b>HOUSING</b>							
Rent		\$2,038.00					
Electric/Gas		\$50.00					
Water bill		\$25.00					
Trash		\$20.00					
Wifi		\$50.00					
Renters Insurance		\$17.00					
<b>TRANSPORTATION</b>							
Gas		\$60.00					
Car Insurance		\$164.00					
Car Payment		\$382.00					
<b>FOOD</b>							
Groceries		\$500.00	\$273.00				
Restaurants		\$200.00	\$0.00				
<b>PERSONAL/LIFESTYLE</b>							
Cell Phone		\$215.00					
Spotify		\$15.00					
<b>HEALTH</b>							
Health Insurance		\$228.00					
<b>SAVINGS ACCOUNT</b>							
Retirement Savings		\$796.00	\$750.00				
<b>TOTAL EXPENSES (EOM)</b>							
		\$4,760.00	\$1,023.00				
<b>BALANCE</b>							
		\$40.00					



# 30) BOOKKEEPING

## Task Over-view

I could spend months talking about bookkeeping with a VA for the business of the everyday Real Estate agent. But here at the root is what needs to be for your VA if you have no system in place. You need to create a very simple spreadsheet that is called "My Business Finances". Then create 12 tabs in the spreadsheet, one for each month of the year.

Chase Business Account			Sphere Rocket Checking		
YEAR	MONTH	DATE		AMOUNT	Category
2020	January	01/03	Recurring Card Purchase 01/02 Dropbox*Xmb5Xfdgc7Rz Di	\$11.99	Friend Filter
2020	January	01/06	Card Purchase 01/03 Recolorado P./Shopping. CO Card 79	\$95.00	UNKNOWN
2020	January	01/06	Card Purchase 01/03 Spirit Airf 4870228218 800-7727117 F	\$71.79	UNKNOWN
2020	January	01/06	Card Purchase 01/03 Payfunnels Httpswww.Payf TX Card 7	\$29.00	Payfunnels
2020	January	01/06	Card Purchase 01/04 Ulinc Httpsulinc.CO GA Card 7907	75.00	ULINC
2020	January	01/07	Card Purchase 01/07 Paypal *Sherynmendo 402-935-7733 C	\$54.25	Transferwise
2020	January	01/07	Card Purchase 01/06 Ulinc 7708638126 GA Card 7907	\$72.58	ULINC
2020	January	01/07	Card Purchase 01/06 Motonden 5127856691 TX Card 7907	\$14.00	UNKNOWN
2020	January	01/07	Card Purchase 01/06 Motonden 5127856691 TX Card 7907	\$14.00	UNKNOWN
2020	January	01/08	Card Purchase 01/07 Amzn Mktp US*NJ81W3M Amzn.Com	\$55.20	Amazon
2020	January	01/10	Card Purchase 01/08 Exp Realty of LLC 775-4326610 WA C	\$85.00	EXP
2020	January	01/10	Recurring Card Purchase 01/09 Pandadoc 415-8004537 CA	\$13.00	PandaDoc
2020	January	01/13	Card Purchase 01/11 Paypal *Freelancer 402-935-7733 CA	\$140.00	Transferwise
2020	January	01/13	Card Purchase 01/11 Paypal *Sherynmendo 402-935-7733 C	\$185.37	Transferwise
2020	January	01/13	Card Purchase 01/11 Paypal *Kimadawn1 402-935-7733 CA	\$103.20	Transferwise
2020	January	01/13	Card Purchase 01/10 Ulinc 7708638126 GA Card 7907	\$62.90	ULINC
2020	January	01/13	3 Recurring Card Purchase 01/11 Pandadoc 415-8004537 C	\$42.70	PandaDoc
2020	January	01/13	Recurring Card Purchase 01/11 Squarespace Inc. Httpsqu	\$26.00	Squarespace
2020	January	01/13	Recurring Card Purchase 01/12 Canva* 02567-8465687 Htt	\$12.95	Canva
2020	January	01/15	Recurring Card Purchase 01/14 Amazon Prime*7G7Yq12 Ar	\$12.99	Amazon
2020	January	01/16	Card Purchase 01/15 Zoom,US 888-799-9666 CA Card 790	\$15.98	ZOOM
2020	January	01/16	Card Purchase With Pin 01/16 Cvs/Pharm 07742-5659 Dall	\$4.96	UNKNOWN
2020	January	01/16	Recurring Card Purchase 01/15 Calendly Httpscalendly GA	\$15.00	Calendly
2020	January	01/17	Card Purchase 01/17 Amazon.Com*8Q0Um0T33 Amzn.Cor	22.98	Amazon
2020	January	01/21	Card Purchase 01/19 Amazon.Com*J62J37X13 Amzn.Com	15.65	Amazon
2020	January	01/21	Card Purchase 01/17 Paypal *Sherynmendo 402-935-7733 C	\$133.92	Transferwise
2020	January	01/21	Card Purchase 01/17 Paypal *Freelancer 402-935-7733 CA	\$100.00	Transferwise
2020	January	01/21	Card Purchase 01/17 Paypal *Kimadawn1 402-935-7733 CA	\$309.00	Transferwise
2020	January	01/21	Card Purchase 01/17 Fuzzy Taco Shop Arlingt Arlington TX	35.87	UNKNOWN
2020	January	01/21	Card Purchase 01/17 Miller Tavern Arlington TX Card 7907	\$64.60	UNKNOWN
2020	January	01/21	Card Purchase 01/17 Cowboys Red River Dallas TX Card 79	\$16.00	UNKNOWN
2020	January	01/21	1 Card Purchase 01/17 Sq *Red River Beverage Dallas TX C	\$15.62	UNKNOWN

The above is just a copy and paste of data from the Bank Account of my main business for the month of January! We only download the DEBITS when looking at expenses. The average Real Estate agent business has between 25 - 75 charges per month, between business purchases, lunches, client gifts etc. Just doing this and adding the sub total at the bottom for all of the debits will show you the monthly expenses. You will see we have a category column with all the categories. You will see we also have an unknown section where my VA will notate that she does not know what goes there. This allows me to go in and edit and check for accuracy and takes my time from an hour down to just 5 minutes.

# 31) RECEIPT STORAGE

## Task Overview

If you have set up the above spreadsheet or something similar we then have a great foundation for receipt storage. We just have a column to the right of each expense and the VA will track whether they can locate a receipt for that item or not. This is extremely effective if you're doing weekly 15 minute calls with your VA about finances. This allows you to not have to spend grueling hours at the end of the year tracking down receipts.

Chase Business Account 1067 - Sphere Rocket Checking							
YEAR	MONTH	DATE		AMOUNT	Category	Receipt Storage	
2020	January	01/03	Recurring Card Purchase 01/02 Dropbox*Xmb5Kf0gc7Rz Di	\$11.99	Friend Filter	Yes	
2020	January	01/05	Card Purchase 01/03 Recolorado P/Shopping, CO Card 79	\$85.00	UNKNOWN	No	
2020	January	01/05	Card Purchase 01/03 Spirit Airt 4870226218 800-7727117 F	\$71.79	UNKNOWN		
2020	January	01/05	Card Purchase 01/03 Payfunnels Httpswww.Payf TX Card 7	\$29.00	Payfunnels		
2020	January	01/05	Card Purchase 01/04 Ulinc Httpaulinc.CO GA Card 7907	75.00	ULINC		
2020	January	01/07	Card Purchase 01/07 Paypal *Sherynmendo 402-935-7733	\$54.25	Transferwise		
2020	January	01/07	Card Purchase 01/06 Ulinc 7708938126 GA Card 7907	\$72.56	ULINC		
2020	January	01/07	Card Purchase 01/06 Mollanden 5127856691 TX Card 7907	\$14.00	UNKNOWN		
2020	January	01/07	Card Purchase 01/06 Mollanden 5127856691 TX Card 7907	\$14.00	UNKNOWN		
2020	January	01/08	Card Purchase 01/07 Amzn Mktg US*Nj81W3M Amzn Com	\$55.20	Amazon		
2020	January	01/10	Card Purchase 01/08 Exp Realty of LLC 775-4326610 WA C	\$85.00	EXP		
2020	January	01/10	Recurring Card Purchase 01/09 PandaDoc 415-8004537 CA	\$13.00	PandaDoc		
2020	January	01/11	Card Purchase 01/11 Paypal *Freelancer 402-935-7733 CA	\$140.00	Transferwise		
2020	January	01/13	Card Purchase 01/11 Paypal *Sherynmendo 402-935-7733	\$185.37	Transferwise		
2020	January	01/13	Card Purchase 01/11 Paypal *Kimedawn1 402-935-7733 CA	\$103.20	Transferwise		
2020	January	01/13	Card Purchase 01/10 Ulinc 7708938126 GA Card 7907	\$62.90	ULINC		
2020	January	01/13	3 Recurring Card Purchase 01/11 PandaDoc 415-8004537 C	\$42.70	PandaDoc		
2020	January	01/13	Recurring Card Purchase 01/11 Squarespace Inc. Httpsqu	\$26.00	Squarespace		
2020	January	01/13	Recurring Card Purchase 01/12 Canva* 02567-0465687 Httj	\$12.95	Canva		
2020	January	01/15	Recurring Card Purchase 01/14 Amazon Prime*7G7Yq12 Ar	\$12.99	Amazon		
2020	January	01/15	Card Purchase 01/15 Zoom.US 888-799-9666 CA Card 790	\$15.58	ZOOM		
2020	January	01/15	Card Purchase With Pin 01/16 Cvs/Pharm 07742-5056 Dall	\$4.99	UNKNOWN		
2020	January	01/15	Recurring Card Purchase 01/15 Calendly Httpscalendly GA	\$15.00	Calendly		
2020	January	01/17	Card Purchase 01/17 Amazon.Com*8Q0Um0T33 Amzn Cor	22.98	Amazon		
2020	January	01/21	Card Purchase 01/19 Amazon Com*J62J37X13 Amzn Com	15.65	Amazon		
2020	January	01/21	Card Purchase 01/17 Paypal *Sherynmendo 402-935-7733	\$133.92	Transferwise		
2020	January	01/21	Card Purchase 01/17 Paypal *Freelancer 402-935-7733 CA	\$100.00	Transferwise		
2020	January	01/21	Card Purchase 01/17 Paypal *Kimedawn1 402-935-7733 CA	\$309.00	Transferwise		

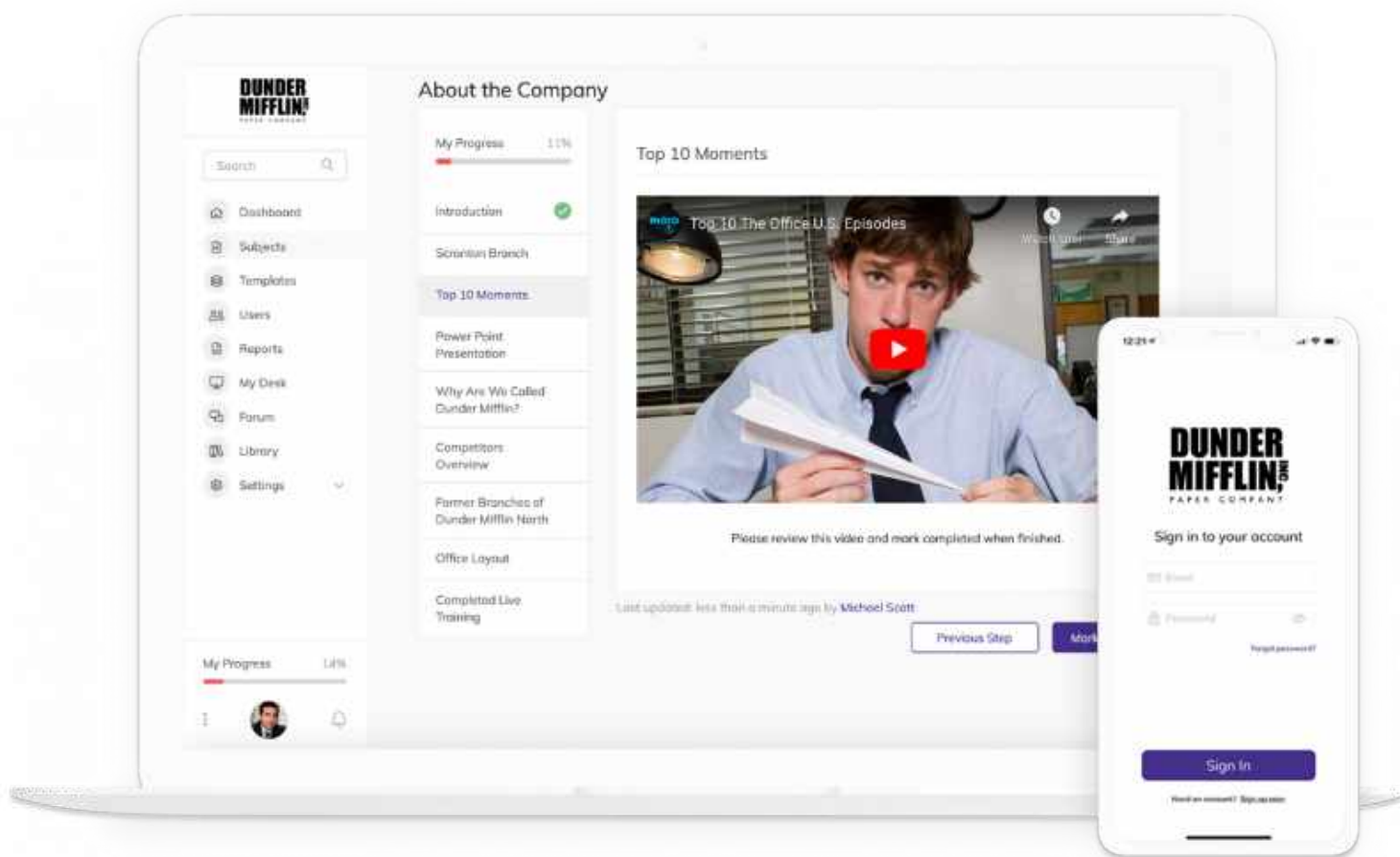
**Step #2** - Create a Shared Google Drive Master Folder Called - " 2020 Receipts \_\_\_\_ " Then create 12 subfolders for each month. Store the receipts for each month in that folder. This allows for easy access. Do not just put in one folder, or it is hard to track down a receipt by date if it's all in one folder.



# 32) CREATING ASANA TEAM ONBOARDING

## Task Overview

If you have a big team or are looking to grow a big team, using Trainual is one of the fundamental game changers in the business of top Real Estate teams across the nation. This is a great system to streamline the onboarding of new agents onto your team at a RAPID pace



## Resources

Trainual.com

# 33) INBOUND PHONE CALLS

## Task Overview

This one is super straight forward, yet super overlooked when someone hires their first Sphere Rocket VA. Your cell phone doesn't have to be the only phone ringing all day. We use a system called CallHippo to field all the calls. Now this process takes some time to transition into as we know your phone # is ON EVERYTHING. Take it slow, create a Callhippo, Google voice, Ringcentral account or whatever app you want to use and start using that number on some of your marketing materials etc. You can slowly transition in your new number and pull out your cell phone # from the direct spotlight.

Types of Calls We See People Direct to a VA

- Sign Calls
- # Listed In The MLS
- Phone Number on Marketing Materials
- Real Estate websites (Realtor.com, Zillow Etc)

\*Now remember your VA can't have Real Estate Licensed conversations. So make sure your VA knows what they can and can't say before passing the lead onto you\*

## Resources

- Google Voice
- CallHippo
- RingCentral

# 34) SIGN CALL LEAD GENERATION

## Task Overview

Now that you have your VA possibly fielding sign calls or internet lead inquiries, you want to teach them how to best convert. Attached is my favorite website that has a great mini training on this subject.

<https://therealestatetrainer.com/2014/10/20/buyer-sign-call-scripts/>



» SCHEDULE A FREE STRATEGY SESSION «

# 35) WEEKLY SELLER UPDATES

## Task Overview

This is one of my favorite things to do, especially when you have some listings that are running a little slower and the sellers are always wanting updates. Each Thursday we have our VA's send out Weekly Seller Updates. Top agents will pick a day of the week and call every one of there sellers to provide them updates. If you can get a VA to send them a Weekly Update via email prior to that call, it takes SO MUCH TIME out of the call, as the seller can see all the hard data. Here is an example provided to us by one of our top Sphere Rocket VA Family Members.

We have provided an example on the next page.

This is something you can easily make it Canva and then make it editable for each and every one of your listings. We have blocked off the sharing agents information. You will see the key elements are:

- Logo (Hidden Behind Green)
- Property Address
- Different Popular Real Estate Portal Stats
- Showing Feedback Compiled (Even if already sent automatically to client)
- # of Showings
- # of Feedbacks Received

If you have multiple listings, when you go to make your weekend seller update calls, you now have the data ready for you to go and all you have to do is have the conversation of what the next action steps are.

# WEEKLY SELLER UPDATES

WEEKLY ACTIVITY UPDATE ON YOUR LISTING:  
1415 WOODLAND AVE.,

**Hello John & Diane,**

Here is an update of the activity we had on your listing.

**TOTAL NUMBER OF SHOWINGS: 37**

**TOTAL NUMBER OF FEEDBACK RESPONSES: 36**

**THIS WEEK'S SHOWING COUNT: 9**

**THIS WEEK'S FEEDBACK COUNT: 9**

**Here is how your home is performing online:**



1,617

45

1,489

1,209

19

Zillow  
Views

Zillow  
Saves

Realtor.com  
Views

MLS  
Views

MLS  
Favorites

Showing Feedback:

Date of Showing	Are your clients interested in purchasing this property?	Why aren't your clients interested in this property?	What would make your clients interested in this property?	Additional comments
05/20/20	No	not quite the layout they are looking for	Liked the updates	great home just not what they are looking for
05/20/20	No	Just didn't feel right for them	No comment	Thank you for the showing
05/19/20	No	-	-	-
05/18/20	No	They need more space	More space	-

# 36) MANAGE YOUR PERSONAL LIFE

## Task Overview

Your VA can reach even into your Personal Life as well. A lot of Real Estate Agents run great businesses, yet leave a trail of disaster in their personal life. Missed dance recitals, baseball practice, choir concerts, dates, spouses birthdays etc. With a VA there is no excuse for any of that. We're going to list a set of tasks we see people use their VA to help improve their Personal Life. Below is a list of totally random tasks we have seen VA's use:

- Communicate with spouse about upcoming kids events to put in calendar
- Reminding of upcoming birthdays, anniversaries etc
- Accountability around scheduling date nights.
- Managing Personal Budget
- Helping coordinate home maintenance home services
- Ordering groceries
- Organizing parties
- Ordering supplies from Amazon
- Scheduling dinner reservations
- Helping schedule vacations
- Watching Ring Camera alerts
- Double checking bills are all being paid



**SCHEDULE A FREE STRATEGY SESSION**





# 37) GROWING INSTANT FOLLOWING

## Task Overview

There is a secret. You can grow a personal brand account to several thousand likes instantly on FB.



## Resources

<https://youtu.be/e0jR8krcexA>



**SCHEDULE A FREE STRATEGY SESSION**



# 38) RUNNING YOUR LINKEDIN

## Task Overview

LinkedIn is one of the most powerful platforms we use with a Virtual Assistant. LinkedIn has transformed into mirroring the looks of Facebook and it is POWERFUL. Many of us have maxed out on our 5,000 Facebook Friends and we want to connect with more people! LinkedIn allows you to connect with over 30,000 people compared to 5. Here is a list of all the tasks we have our Virtual Assistants do on LinkedIn!

**Step #1** - Update LinkedIn Profile with Vibrant Cover Photo!

**Step #2** - Add Video Testimonials

Copy Justin's Profile For Suggestions: <https://www.linkedin.com/in/justin-nelson-82b98412a/>

**Step #3** - Copy all Facebook posts into LinkedIn. The platforms perform similarly

**Step #4** - Go through and like and interact with the posts daily by liking and comments and wishing happy job anniversaries

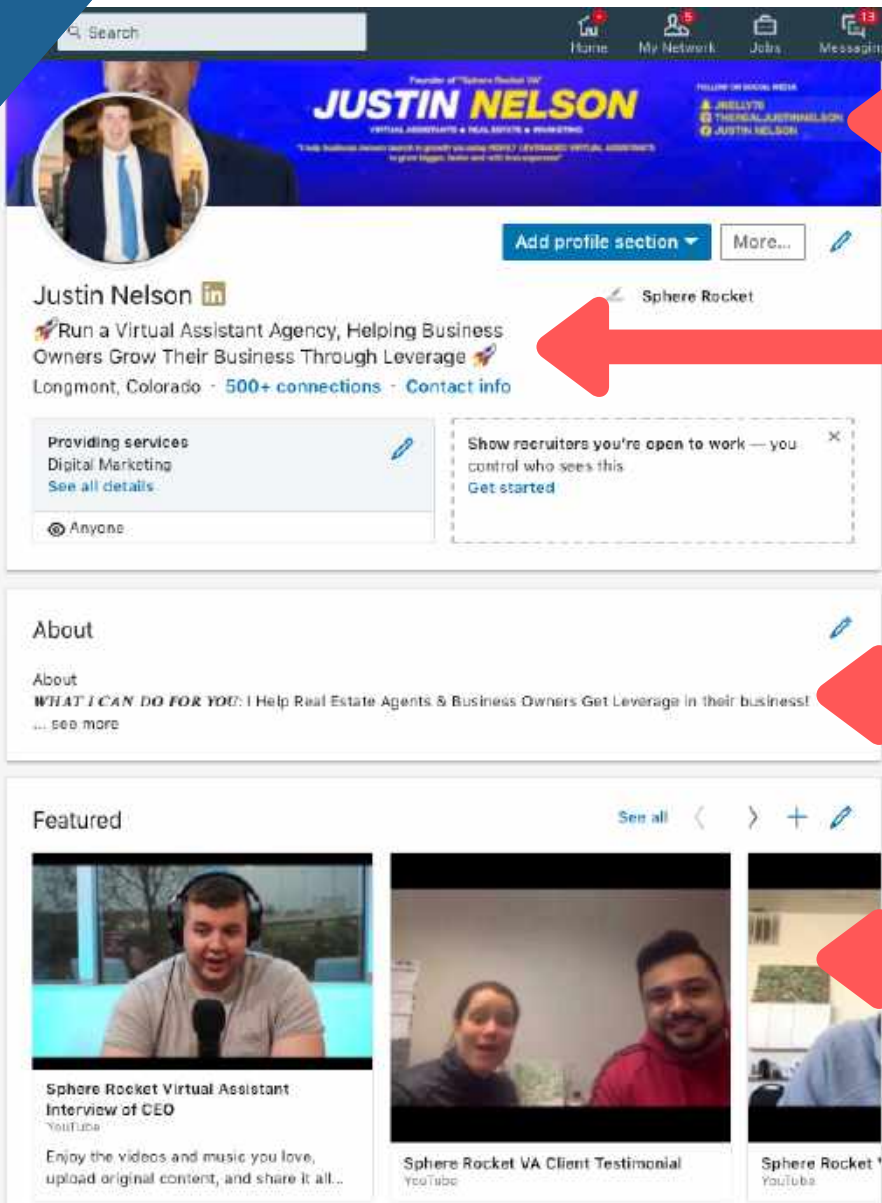
**Step #5** - Connect with new people (We use a system called ULINC to send automatic connections out. Visit [www.sphererocket.com](http://www.sphererocket.com) to get access)



**SCHEDULE A FREE STRATEGY SESSION**



# PAGE SETUP



A TON OF PROFILES DON'T HAVE Custom profiles. Use Canva size 1536 x 768

Add a quick snap shot of what you do

Write your Bio

Add Video Testimonials

If you don't do anything else at all, at least let your VA access your LinkedIn and update your account for social credibility.

» **SCHEDULE A FREE STRATEGY SESSION** «

# 39) RUNNING A VIP FB GROUP

## Task Overview

This is a really easy and effective way to grow your following amongst your past clients. No matter the number of past clients you have, this is a great strategy to build a community of raving fans. The point of this is to create a Private FB group that houses only your past clients. This is a place to post exclusive events, market updates, and SHOUT OUTS to your past clients who send you referrals. Below are the steps:

**Step #1** - Create a Private Facebook Group & Name It

- Example "Smith Team Exclusive VIP Past Clients"

**Step #2** - Create a Cover Photo & About Section

**Step #3** - Add your VA as a group Editor or Moderator. I would not add as admin

**Step # 4** - Determine a Content Strategy to post in there. Examples Below

- Post Client Events
- Post Market Update Videos
- Post Special Discounts
- Post Vendor List



**SCHEDULE A FREE STRATEGY SESSION**



# 40) B2B APPOINTMENT SETTING

## Task Overview

Every Real Estate agent has a business niche and there are power partners that you know could help you achieve your goals and vice versa. A virtual assistant is a great person to help formulate this target list. Let's say you have a passion for restaurants and you want to meet all the owners of these local businesses. Because you know if you connect with business owners, behind a passion of yours, things are going to go well as you grow your database with more people you know!

**Kyle Whissel out of San Diego Inspired Our Strategy For this!**  
**Check out his youtube channel -** [https://youtu.be/m\\_YUWllbKkKw](https://youtu.be/m_YUWllbKkKw)  
**Thought Behind Strategy:** <https://youtu.be/6xCCAgG1C3g>

Your VA can easily aggregate this information using the same format as the master database we showed you in a previous page. Then if you want to take it a step further, your VA can even make the outreach and set the appointments. Just provide them the script you want them to use, and you're off to the races. Again, it is best for you to make the first few calls to know what objections you're going to get etc.

Notes	Date Added	First Name	Last Name	FB Profile Link	Company Name	Address	City	Zip Code	State
		Keith	Alba	<a href="https://www.facebook.com/keith.alba">https://www.facebook.com/keith.alba</a>	Keller Williams	360 INDIANA ST STE 300 GOLDEN,	CO, United States	\$80,401.00	Golden, CO
		James	Kim	<a href="https://www.facebook.com/jmkimrealestate">https://www.facebook.com/jmkimrealestate</a>	Keller Williams				Joppatowne, Maryland
		Kyra	Duffy	<a href="https://www.facebook.com/kyraduffy5">https://www.facebook.com/kyraduffy5</a>	Keller Williams				Longmont, CO
		Morgan	Peterson	<a href="https://www.facebook.com/morgan.peterson.7186">https://www.facebook.com/morgan.peterson.7186</a>	exo realty	1573 E 17th St. Idaho Falls,	ID, United States	\$83,404.00	Bowle, Idaho
		Kym	Ward	<a href="https://www.facebook.com/profile.php?id=100007842588527">https://www.facebook.com/profile.php?id=100007842588527</a>	Century 21	414 Ashe St Johnson City,	TN, USA	\$37,004.00	Johnson City, TN
		Caressa	Cox	<a href="https://www.facebook.com/caressa.cox">https://www.facebook.com/caressa.cox</a>	Keller Williams				Longmont, CO
		Kandis	Sweeney	<a href="https://www.facebook.com/kandis.sweeney">https://www.facebook.com/kandis.sweeney</a>	Keller Williams				California
		Kris	Colquhoun	<a href="https://www.facebook.com/kris.colquhoun.9">https://www.facebook.com/kris.colquhoun.9</a>	Keller Williams	620 S Fry Rd Katy,	TX, United States	\$77,450.00	Houston, TX
		Heather	Moudry	<a href="https://www.facebook.com/heather.cassadams">https://www.facebook.com/heather.cassadams</a>	exo realty				Bozeman, MT
		Cynthia	Christensen	<a href="https://www.facebook.com/cynthiachristensen.98">https://www.facebook.com/cynthiachristensen.98</a>	Sell State Real Estate	3601 STADECCAGH RD# 201 LONGMONT,	CO, United States	\$80,504.00	Mead, CO
		Chrissy	Storm	<a href="https://www.facebook.com/chrissy.storm">https://www.facebook.com/chrissy.storm</a>	Independent Brokerage	280 CO-133Carbondale,	CO, USA	\$81,623.00	Colorado
		Courtney	Jetelina	<a href="https://www.facebook.com/courtney.jetelina">https://www.facebook.com/courtney.jetelina</a>	exo realty	One Reverly, Ste 1700 Houston,	TX, USA	\$77,056.00	Houston, TX
		Cindy	Saacson-Slevin	<a href="https://www.facebook.com/cindy.slevin">https://www.facebook.com/cindy.slevin</a>	Heritage Title				Denver, CO
		Gavin	Clark	<a href="https://www.facebook.com/profile.php?id=100010664462498">https://www.facebook.com/profile.php?id=100010664462498</a>	First American Title	4795 Regent Blvd Suite 200 Irving,	TX, USA	\$75,063.00	Dallas, TX
		Bryan	Baylon	<a href="https://www.facebook.com/profile.php?id=10005589">https://www.facebook.com/profile.php?id=10005589</a>	Keller Williams Northeast Realty	2085 W Happy Valley RdPhoenix,	AZ, USA	\$85,085.00	Phoenix, AZ, United States
		Dave	Zajdzinski	<a href="https://www.facebook.com/dave.zajdzinski">https://www.facebook.com/dave.zajdzinski</a>	eXp Realty	60 E Rio Salado PkwyTempe,	A, USA	\$85,261.00	Mesa, AZ, United States
		Meghan	Kelly	<a href="https://www.facebook.com/meghan.kelly.realtor">https://www.facebook.com/meghan.kelly.realtor</a>	Keller Williams	6140 Tull Blvd Ste 100, Colorado Springs,	CO, United States	\$80,023.00	Colorado Springs, CO, United States
		Aline	Roy	<a href="https://www.facebook.com/alinero.35">https://www.facebook.com/alinero.35</a>	Keller Williams Realty Merrimack Valley				Lowell, MA, United States
		Josh	Hunter	<a href="https://www.facebook.com/josh.hunter">https://www.facebook.com/josh.hunter</a>	St. Vrain Realty	600 5th Ave Longmont,	CO, United States	\$80,501.00	Longmont, CO
		Luis Inzaray	Jr	<a href="https://www.facebook.com/profile.php?id=100017740751427">https://www.facebook.com/profile.php?id=100017740751427</a>	Freedom Mortgage Group LLC	24275 Katy Frey #400, Katy,	TX, United States	\$77,494.00	Katy, Texas
		Kelley	Clayton	<a href="https://www.facebook.com/kelley.g.clayton">https://www.facebook.com/kelley.g.clayton</a>	exo realty	3150 N Elm St, Suite 201 Greensboro,	NC, United States	\$27,409.00	Burlington, North Carolina
		Christopher	Roybal	<a href="https://www.facebook.com/chrstopher.a.roybal">https://www.facebook.com/chrstopher.a.roybal</a>	Licensed Agent				Houston, Texas
		Kate	Fey	<a href="https://www.facebook.com/kate.fey211">https://www.facebook.com/kate.fey211</a>	exo realty				Longmont, Colorado
		Troy	Corbin	<a href="https://www.facebook.com/troycorbin">https://www.facebook.com/troycorbin</a>	Catalina Wine Mixer				Louisville, Kentucky
		Kevin	Correia	<a href="https://www.facebook.com/kevincorreia.12">https://www.facebook.com/kevincorreia.12</a>	Keller Williams	665 Rogers St, Lowell,	MA, United States	\$1,852.00	Lowell, MA
		Brenda	Cumwick	<a href="https://www.facebook.com/brenda.cumwick">https://www.facebook.com/brenda.cumwick</a>	Keller Williams Arizona Living Realty	This page isn't available			Kingman, Arizona
		Tiffany	Moore	<a href="https://www.facebook.com/tiffany.moore.18400">https://www.facebook.com/tiffany.moore.18400</a>	Keller Williams	11400 Parkside Dr #120Knoxville,	TN, USA	\$37,834.00	Kingston, TN

# 41) DAILY APPOINTMENT CONFIRMATIONS

## Task Overview

This one is super simple. Email & Text Confirmations can be a game changer. Especially with wishy-washy buyers. Each morning, my VA will send out emails and texts to my meetings for the day to confirm the appointment time and location! It is a really simple script and is just made to get ahead of the "Oh I need to cancel". I would much rather that happen at 8:00am than I would at 1:45pm for the 2pm meeting they forgot about.

### Sphere Rocket Qualification Call Paige Email x



**Paige Perez**

to info, me -

Hey Chrystal,

Justin is super excited to meet with you today, July 28 at 04:30 PM CST  
via zoom at the link: <https://us02web.zoom.us/j/7625153148>

If you have any questions please let us know!



Best,  
**Paige Perez (Ms)**  
Executive Assistant  
[paige@sphererocket.com](mailto:paige@sphererocket.com)

Sphere Rocket VA  
111 Acklen Park Drive #319 Nashville, TN 37203  
[www.SphereRocket.com](http://www.SphereRocket.com)

The key with this is to assume they're still good for the time. Don't ask, "does this still work for you?"

If you ask that, over 50% of the time they will try and reschedule on you to a more convenient time for them. Why is that? They don't have an awesome VA, like you do. This has saved ME HUNDREDS of appointments that needed to cancel and guess what! The VA then can easily reschedule them right away and it never even touched your plate. This is why it's critical to stick to your google calendar!

You can do this with:

- Buyer Appointments
- Listing Appointments
- Meetings with Other Business Owners
- Meetings with Power Partners
- Meetings with your Husband/Wife...hehe maybe don't do that

# 42) PROPERTY MANAGEMENT COORDINATION PERSONAL

## Task Overview

A lot of Real Estate Agents buy investment properties as their source of investing for the future. At the same time though, our businesses keep us so busy, the last thing we want to do is to have to property manage our properties. However, 8-12% a month can eat up our cash flow, if we were to use a property manager. Most agents who have just 1-3 investment properties can easily get their VA who is already on staff to manage these rentals for them. From Tenant communication, to repairs etc. The best part of this is that you can still be as involved or not involved as you want. You're already paying your awesome VA, so whether you have one property or three, you go from paying a property manager \$700 a month + for all three to keeping it in house. Now I am not going to tell you how you should manage your rental. The process comes down to just a few steps. Assign the ones you want to your VA:

- Listing of the Rental For Release
- Tenant Screening
- Tenant Showings (Pay Another Agent to do, VA can't do)
- Coordination of Lease Signing
- Coordination of Repairs

## Resources

[www.biggerpockets.com](http://www.biggerpockets.com)

**Estimated Time Saved: A TON**

**Estimated Money Saved: 8-12%**

# 43) STEAL FB ADS

## Task Overview

Most People don't realize you can look at the ads of your competitors using the Facebook Ad Library. One task I have my VA do on a consistent basis for me, is to search for all the ads agents in my local market are doing!

### Step #1 - Visit

<https://www.facebook.com/ads/library>

### Step #2 - Search Your Competition

The screenshot shows the Facebook Ad Library interface. At the top, it says "FACEBOOK" on the left and "United States" and "Justin" on the right. The main heading is "Ad Library" with a subtext: "The ad library provides advertising transparency by offering a comprehensive, searchable collection of all ads currently running from across Facebook apps and services, including Instagram." Below this is an illustration of a person looking at a screen with a magnifying glass. The "Search Ads" section prompts the user to "Choose a category to start your search." and offers three buttons: "Issues, Elections or Politics", "Housing", and "Search all". A search bar below contains the text "Search for ads by advertiser name". The "Frequently Asked Questions" section is also visible, with a question: "What is the Facebook Ad Library and how do I search it?" and a partial answer: "The ad library is a place where you can search for ads that are running across Facebook apps and services. You can use it to get information about".

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# 44) MONTHLY MARKET UPDATE VIDEO BLASTS

## Task Overview

Market update videos are simple. Shoot a video about your market and send it out to people. Now that your VA has your master database cleaned up in a spreadsheet for you and each of your agents, you now have a bunch of emails you never had. Your CRM may be capable of sending blast video emails - if it is not, you can use MailChimp or BombBomb as alternate options!

If you want to put some minor edits on the video....veed.io is a great to put some extra touches on the video and it is also great for resizing.

<https://youtu.be/FLCuTu2UkTE>



## Resources

- **MailChimp**  
(<https://www.youtube.com/user/MailChimp>)
- **BombBomb**
- **Veed.io**

# 45) MANAGING VENDOR LIST

## Task Overview




Have your VA manage your Preferred Vendor List.

Use ours for an example!

[https://www.canva.com/design/DAEDY\\_sRU5Q/bqcjpLPyfH93833LeHiIXA/view?utm\\_content=DAEDY\\_sRU5Q&utm\\_campaign=designshare&utm\\_medium=link&utm\\_source=sharebutton&mode=preview](https://www.canva.com/design/DAEDY_sRU5Q/bqcjpLPyfH93833LeHiIXA/view?utm_content=DAEDY_sRU5Q&utm_campaign=designshare&utm_medium=link&utm_source=sharebutton&mode=preview)

**Trusted Vendors**

<b>Home Inspector</b> Joe Smith 720-556-7658 Joe@homeinspect.com	<b>Title Company</b>	<b>Lender</b>
<b>HVAC</b>	<b>Plumbing</b>	<b>Electrician</b>
<b>House Cleaning</b>	<b>Locksmith</b>	<b>Appraisal</b>

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# 46) COLD SOCIAL MEDIA MESSAGING

## Task Overview

Now that you have your master database set and you know who you have social links for and who you don't, it's time to start messaging people. I call it the social 25. Each day I want to send 25 Messages out through Facebook Messenger. Here are a few scripts I use just to engage conversation. We never start with a sale in mind! Over time this is a task my VA learns how I talk and sends this for me. Check out the "**How I talk worksheet on the next page**". This document was created to help give your VA your voice.

### **Script #1 -**

"Hey I just saw \_\_\_\_ on Facebook and wow that's awesome. It has been quite awhile since we connected and I just wanted to say hi"

### **Script #2 -**

"Hey I hope you and the family are doing well. I saw that (something off their page) just happened and that's awesome. I am not sure if you saw my post or not on my FB page, but I am in a competition to see who can get the most real estate referrals in the next two weeks (and you know I am competitive). Would you mind letting me know if you come across anyone in the next two weeks who is thinking about buying, selling or investing in Real Estate?"



# HOW MY TEAM LEADER TALKS

***What are your top 10 phrases?***

- 1.-
- 2.-
- 3.-
- 4.-
- 5.-
- 6.-
- 7.-
- 8.-
- 9.-
- 10.-

**Example:** Wow you're killing it

**How would you wish someone a Happy Birthday?**

**How would you comment on a fun looking vacation post?**

**How would you comment on a fun family picture of someones?**

**How would you comment on a post about someone's great dinner?**

**How would you comment on a funny post that made you laugh?**

**What is your favorite emoji to use on posts?**

**What are the top 30 Gifs you use in different situations.**

## **Pro Tip:**

One of the craziest but easiest ways to do this without having to think too much about it is to screen record yourself using loom or screencast-o-matic on a 1 hour session of you going through your FB and commenting and liking and commenting on people's post naturally. If you do this, your VA can now go back and record all of the types of phrase you're posting and can start to learn how you talk and behave on social. Remember mastery doesn't come easy.

# 47) BUILDING AGENT TO AGENT REFERRAL NETWORK

## Task Overview

Nothing is better than a referral. Most of you work on big brokerages, or work in a big state with a TON OF REAL ESTATE AGENTS. I am going to give you an example of how we can take advantage of this.

### *Setting the Scene:*

1. Mary works for xyz brokerage
2. xyz brokerage has 100,000 agents across the country
3. Mary works in Fort Collins, CO

### *Steps Success:*

1. **Determine what major markets are outside of your working zone**
  - a. For Mary this would be **Denver, CO & Colorado Springs & Pueblo & Grand Junction**
2. **Create a database spreadsheet list of all agents that also were at her same national brokerage in those cities**
  - a. So Mary gets a roster from the Denver, CO XYZ company and so on
3. **Mary then takes all of those agents and puts them on a monthly drip campaign that talks about the Northern Colorado Fort Collins Market**
  - a. On each email she includes the referral % she closes.
  - b. This list if she was with KW would be over 2,000+ Agents Monthly
  - c. This list if she was with EXP would be over 2,000+ Agents Monthly
  - d. This is if she was with REMAX would be over 2,000+ Agents Monthly
4. **Mary would also if she had room add all of these people to her FB friends list**

Notes: So many agents at large brokerages focus on getting referrals from other states when their own state is a gold mine of referrals.

### *\*Special Note\**

*If you're at a smaller independent brokerage or you're your own broker, this strategy still works great, you just would want to start by connecting with other smaller independent brokers who also don't have a bigger company referral database to rely on.*

# 48) SCHEDULING SHOWINGS

## Task Overview

This is a super easy one to accomplish. Teach your VA how to schedule showings for you. Here are the steps we take to teach our VA to schedule showings for us. This can also be a great value add to have your VA do for your agents:

- **Step #1** - Use Loom or Screencast-o-matic to record the process of what you do from the time you have a client request a showing to the scheduling of it, mapping it out etc.
- **Step #2** - Determine how your going to tell a VA to scheduling showings for you
- **Step #3** - Teach your VA how to map out showings for timing based on your market travel times. Use apps to determine what the average drive time is.



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# 49) MLS BUYER ENGINE INITIAL SET UP

## Task Overview

This is another super easy one to accomplish. Teach your VA how to make buyer search engines for you. While we will still go in and check them for our clients before we let them just run, sometimes we just need someone to set them up for us.

- **Step #1** - Use Loom or Screencast-o-matic to record the process of you creating a buyer search engine
- **Step #2** - Send your VA all the MLS training that is available. This is good just in general for your VA to know how to do everything with your MLS
- **Step #3** - Many MLS search engine portals also give stats on when a user logs in, when they favorite a property etc. Have your VA send you alerts when your clients favorite properties. You will be surprised how many times you can get what feels like a dead buyer, out into a car when you have a perfectly timed call.



# 50) FINDING OPEN HOUSE

## Task Overview

Many agents thrive on running open houses; however, with inventory so low, sometimes it's not always feasible to hold open our own listings. So we have our VA's use the following script to request open houses from other agents in our local market. All markets/brokerages have different regulations on whose home you can and can't hold open. This even works emailing people within your own brokerage.

### **Step #1** - Search MLS for Ideal Open Houses

- Teach your VA what an ideal open is
  - 4 Bed
  - 3 Bath
  - Vacant etc

### **Step #2** - Send the following email to 20+ agents weekly





# EMAIL TEMPLATE

"Hey \_\_\_\_\_,

I hope this finds you doing well! My name is \_\_\_\_\_, and I am an agent for The John Smith Team and the Rocket Home Team.

I noticed you have obtained a new listing at the subject property, and I am looking host an open house this \_\_\_\_\_. I saw you didn't have one scheduled and wanted to let you know that I would be more than happy to run one for you and your seller(s) if you were open to it. I apologize in advance if you do have one scheduled and we missed it when browsing the MLS.

As members of the Real Estate community, we wish to have open collaboration with all agents around us, thus increasing value to clients collectively. Having me host an open house will increase exposure for your listing, increase the likelihood of a quick sale while also allowing myself to potentially pick up the buyer for your listing.

All I ask is that the open house gets entered in the MLS(s) and syndicated. I will provide signage, flyers, and paid advertisement via Facebook sponsored ads. If you are okay with me running an open house for you, just shoot me a message back and we can finalize the details.

I look forward to hearing from you!





# The Secret Math Of Mega Agents

## Example Virtual Assistant Cost

- Real Estate VA at \$4 Per Hour
- Full Time
- \$640 Per Month For Full Time Work
- **\$7,680 Per Year**
- Gives you 30+ hours of your time back a week

## Real Estate Agent Income

- Buy/Sell Transaction
- \$200,000 Sell
- \$300,000 Buy
- = **\$15,000 Commission**

**If you can't see how a full time assistant giving you 30+ hours of your time back per week can help you do **one** more Real Estate Transaction for 2x ROI at an average United States Price Point.....You don't think big enough and just aren't ready for leverage yet. Oh, and did we mention you get 30+ hours of your time back?? That's time for you to go spend with that precious family you're doing all of this for!**



## CAN YOU IMAGINE

*If We Just Gave Away One of Our Main Playbooks For FREE?*



*Can you imagine the level of training we provide our clients who hire a Sphere Rocket VA?*





**READY TO HIRE A SPHERE ROCKET VA?**

**[CLICK HERE TO SCHEDULE A TIME](#)**

***JUST SCHEDULE A TIME ON THE CALENDAR AND WE WILL SPEAK 1 ON 1 WITH YOU TO SEE IF YOUR A FIT FOR OUR VA PROGRAM***



**SCHEDULE A FREE STRATEGY SESSION**

