

Client Processes Playbook



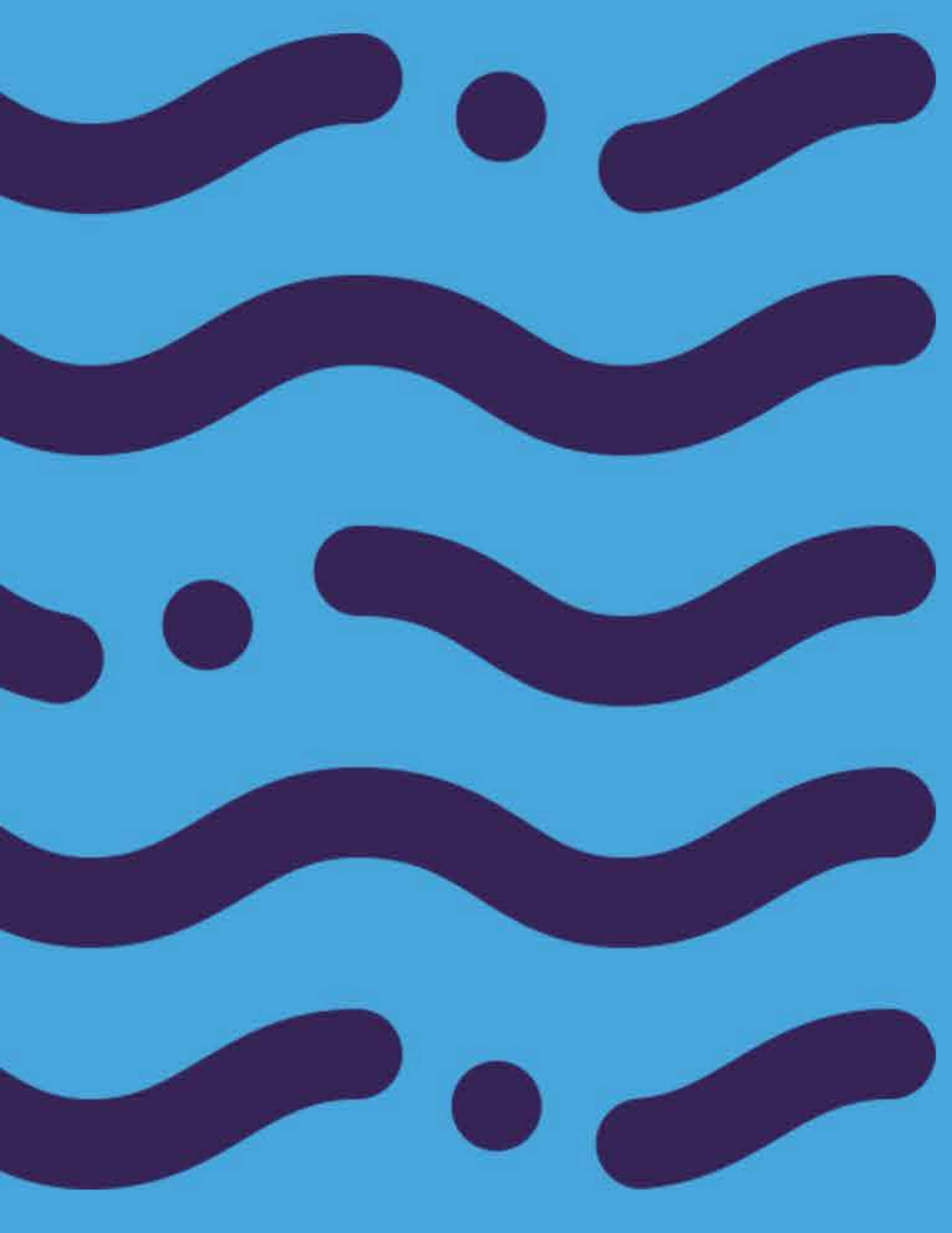
About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at:
OutsourceAccess.com/process





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ADMINISTRATIVE

Task | Managing Invoice and Documents

Description of the Task: This task entails a system of collaborative management. The procedure involves the receiving and organizing documents according to what it needs, such as signing, processing and collaborating with relevant resource persons. This task allows for easier tracking and facilitation of important documents, increasing the organization's overall productivity and efficiency.

1. Receive and organize documents that require electronic signatures via DocuSign, such as contracts, agreements, and authorization forms.
2. Prepare the documents for electronic signing by uploading them to the DocuSign platform. Ensure that all necessary fields and signatures are appropriately placed within the documents.
3. Use the DocuSign platform to send signature requests to relevant parties. Ensure that the documents are sent to the correct recipients and track the status of each request.
4. Monitor the status of signature requests and follow up with recipients as needed to expedite the signing process.
5. Once all required parties have signed the documents, confirm the completion of the process on DocuSign and organize the signed documents.
6. Receive and review incoming invoices from vendors and service providers. Verify that invoices are accurate and match the agreed-upon terms.
7. Maintain a record or spreadsheet to track invoices, due dates, and payment status. Ensure that payments are processed on time and follow up on any outstanding invoices.
8. Conduct research to gather data on comparable properties, sales, or rentals in the relevant real estate market. This information is often used for property valuation and analysis.
9. Organize the gathered data into a structured format or presentation to use in property appraisals or market analysis.
10. Assist in the creation and distribution of Request for Proposals (RFPs) for various projects or services. This includes outlining project requirements, deadlines, and evaluation criteria.
11. Receive and organize responses to RFPs from potential vendors or service providers. Ensure that responses are complete and compliant with the RFP requirements.
12. Collaborate with relevant team members to review and evaluate RFP responses. Compare vendor proposals and provide a summary and or analysis.
13. Prepare and manage Letters of Authorization (LOAs) for various purposes, such as granting permission or access to specific individuals or entities.
14. Deliver the LOAs to the intended recipients and maintain records of the distribution.

FINNANCE



Task | Balancing Bank Reconciliations

Description of the Task: This task involves the creation of a thorough bank reconciliation process by collecting statements and supporting documents. Transactions between the bank are compared, assessed, and validated to ensure accuracy in the reconciliation. A report detailing discrepancies, missing transactions and errors are promptly made to assure accurate, transparent and efficient balancing of bank reconciliations.

1. Collect the bank statements, including the latest statement and any supporting documents such as deposit slips and check records.
2. Log into the accounting software that the client uses for financial transactions and reconciliations.
3. Compare transactions on the bank statement with those recorded in the accounting software.
4. Match the deposits on the bank statement with the corresponding income entries in the accounting software. Ensure that the amounts and dates align.
5. Match the withdrawals on the bank statement with the corresponding expense entries in the accounting software. Verify the accuracy of the amounts and dates.
6. Note if there are discrepancies between the bank statement and the accounting records. Document them for further investigation.
7. Reconcile any outstanding checks. This involves ensuring that checks that were issued but not yet cleared are accounted for.
8. Make necessary adjustments in the accounting software to bring it in line with the bank statement. This may involve adding missing transactions or correcting errors.
9. If applicable, reconcile credit card statements in the same manner, comparing transactions, matching them, and adjusting the accounting records.
10. Double-check that all checks and transactions have cleared the bank and that the reconciliation is accurate.
11. Compile the discrepancies or issues discovered during the reconciliation process for the client's records.
12. Generate reconciliation reports from the accounting software to provide to the client as evidence of the bank reconciliation.
13. Submit the reconciliation reports with the client for review and approval. Address any questions or concerns they may have.
14. Once the client approves the reconciliation, finalize it in the accounting software and ensure that the accounts are up to date and accurate.

Task | Reviewing General Ledgers

Description of the Task: This task involves cross-referencing and validating account statements. It entails the gathering of specific accounts and its respective data, and the review of entries, balances, and corresponding financial statements. A documentation of findings, highlights, and recommendations are then summarized in a concise, accurate, and transparent report.

1. Log into the client's accounting software where the general ledger is stored.
2. Find and navigate to the general ledger section within the accounting software.
3. Choose the specific date range you want to review. This could be a month, quarter, or year, depending on the client's objective.
4. Go through each account listed in the general ledger and review the opening and closing balances for the selected date range. Ensure that they are accurate.
5. Examine individual transactions listed under each account. Check for accuracy, relevance, and proper categorization.
6. If you notice any discrepancies, errors, or unusual entries, document them for further investigation.
7. Ensure that any accounts requiring reconciliation, such as bank accounts, are balanced and in agreement with corresponding financial statements.
8. If applicable, cross-reference the general ledger with subsidiary ledgers to confirm that all transactions are accurately recorded.
9. Examine journal entries for accuracy and appropriateness. Make sure debits and credits are correctly recorded.
10. Analyze financial transactions to ensure they align with the client's financial goals, budget, and business objectives.
11. Identify any financial trends, anomalies, or patterns that may require further analysis.
12. Document your findings, including any discrepancies or recommendations for corrections, in a clear and organized manner.
13. In case of unclear or questionable entries, communicate with the client or the relevant team members for clarification.
14. Prepare a summary report of the review. Highlight key findings and recommended actions.
15. Discuss your findings and recommendations with the client. Collaborate on resolving discrepancies or making necessary adjustments to the general ledger.
16. Once the client approves any corrections or adjustments, ensure that the general ledger is up to date and accurate. Maintain a clear record of your review for reference.

Task | Assisting Payment of Medical bills

Description of the Task: This task involves a comprehensive and efficient system of assisting payment of medical bills. It entails a thorough review of the bills for accuracy, documentation of receipts, and a secure processing of payment. The task removes the hassle of managing medical bills, and ensures safe overall settlement.

1. Log in to the HSA account portal using the client's login credentials or contact the HSA provider to gain access to the account.
2. Check the current balance in the HSA account to ensure there are sufficient funds available to cover the medical bill.
3. Obtain the medical bill that needs to be paid. This bill may be provided by the client, the healthcare provider, or the insurance company.
4. Review the medical bill thoroughly to ensure its accuracy. Verify details such as the patient's name, provider information, services rendered, and the total amount due.
5. Save a copy of the medical bill for your records and for the client's reference.
6. Within the HSA account portal, locate the option for making payments or reimbursing medical expenses.
7. Enter the necessary information from the medical bill into the payment system. This typically includes the healthcare provider's name, address, the account number (if applicable), and the total bill amount.
8. Choose the HSA account as the payment method for covering the medical bill.
9. Double-check all payment details for accuracy, including the payment amount. Ensure it matches the total bill amount.
10. Authorize the payment using the client's HSA account credentials or any required security measures.
11. Confirm that the payment has been successfully processed and is on its way to the medical service provider.
12. Save the payment confirmation or receipt provided by the HSA account portal. This serves as proof of payment.
13. Inform the client that the medical bill has been paid using their HSA account. Provide them with a copy of the payment confirmation for their records.
14. Record details of the payment, including the medical bill, payment confirmation, and any related communication. Organize these records for future reference.
15. Follow up with the client to ensure that the payment has successfully cleared the bill and that they are satisfied with the process.

Task | Collecting and Organizing Account Statements

Description of the Task: This task involves a process of gathering, organizing and reviewing account statements from respective bank and finance institutions. Statements of accounts are directly collected from bank representatives and organized according to an agreed system. This process is essential in maintaining a transparent record of finances and understanding their trends.

1. Obtain the contact information for the respective representatives at Verizon, Vicmead, and Citi who can provide the statements of account. This may include email addresses or contact numbers.
2. Reach out to the account representatives to request the statements of accounts. Clearly communicate the need for these documents and any specific details required.
3. If necessary, follow up with the account representatives to ensure they are processing your request and inquire about the expected timeframe for receiving the statements.
4. Once you receive the account statements, download or save these documents to your computer or a designated folder.
5. Arrange the account statements on a spreadsheet application such as Microsoft Excel or Google Sheets.
6. Organize the data in the spreadsheet, making it easy to read and understand. You can use formatting, color-coding, or sorting options as needed.
7. Review the spreadsheet to confirm that you have received statements of account from all three sources (Verizon, Vicmead, and Citi) and that the data is complete.
8. Save the spreadsheet with an appropriate file name for easy retrieval. Consider creating a folder to store related documents.
9. Inform your client that you have collected the account statements and classify them accordingly. Provide them with access to the spreadsheet or send them a copy, based on their preference.
10. Share the contact information for the account representatives in case the client needs to follow up or clarify any details.
11. Keep records of your communication with the account representatives and any relevant notes for future reference.

Task | Preparing Financial Underwriting Reports for Commercial Real Estate Transactions

Description of the Task: This task involves the analysis of financial performance, market trends, and assessment of risks. Relevant data is gathered and summarized in a format that allows for easier consumption and understanding. This process allows the development of a comprehensive and accurate financial underwriting report.

1. Obtain detailed information about the commercial real estate property, including property type, location, size, and any relevant features.
2. Request financial documents related to the property, such as income statements, rent rolls, operating expenses, and historical financial data.
3. Review the collected financial documents to ensure that they are complete and up to date. Notify the client or relevant parties of any missing or inconsistent information.
4. Enter the data into a spreadsheet or financial underwriting software. This data may include rental income, expenses, vacancy rates, and other financial metrics.
5. Analyze the financial data to calculate key performance indicators (KPIs) such as Net Operating Income (NOI), Capitalization Rate (Cap Rate), and Debt Service Coverage Ratio (DSCR).
6. Research and gather information on the current market conditions and trends in the location where the property is situated. This can include rental rates, vacancy rates, and property appreciation rates.
7. Assess the financial risks associated with the property. Consider factors such as tenant stability, lease terms, and market volatility.
8. Create financial models that project future income and expenses for the property. This may involve using spreadsheet software to perform sensitivity analysis and scenario modeling.
9. Prepare a comprehensive financial underwriting report that summarizes the property's financial performance, market analysis, risk assessment, and financial projections. The report should be clear and well-organized.
10. Review the report with the client or relevant stakeholders. Discuss the findings, assumptions, and recommendations.
11. Address any questions or concerns raised by the client. Provide additional information or clarification as needed.
12. Maintain records of your communication and collaboration with the client, including any revisions or modifications to the financial underwriting report.
13. If applicable, assist the client in submitting the underwriting report to potential lenders, investors, or partners for financing or investment purposes.
14. Conduct follow-up as necessary, addressing any additional requests for information or revisions to the financial underwriting report.



OPERATIONS

Task | Filtering and Creating Contact Lists Based on the CRM

Description of the Task: This task entails the navigation of the CRM system to gather relevant contact information and the assessment of existing lists. Through the use of specific filters developed for the client's objectives, data is collected, stored, and organized in an accessible format. The data is also regularly updated to keep up with the changes. These data are useful for maintaining a well managed contact list system.

1. Log in to the Customer Relationship Management (CRM) system using your credentials.
2. Locate and click on the section of the CRM where contacts or lists are stored. This may be labeled as "Contacts," "Lists," or similar.
3. Review the existing contact lists within the CRM to understand their content and purpose.
4. Collaborate with your client to define the criteria for filtering contacts. This could be based on demographics, behavior, interests, or other factors.
5. Use the filtering or search options in the CRM to apply the criteria. This typically involves setting filters and conditions, such as age, location, purchase history, or engagement level.
6. Execute the filter, which will generate a list of contacts that meet the specified criteria.
7. Review the filtered list to ensure it includes the desired contacts and excludes those that don't meet the criteria.
8. Create a name or label for the newly filtered list to make it easily identifiable.
9. Save the filtered list in the CRM for future use. Most CRMs provide options to save filtered lists as segments or new contact groups.
10. As a best practice, create a backup or duplicate of the filtered list to prevent accidental data loss.
11. Test the filtered list by using it for specific marketing campaigns or communications to ensure it functions as intended.
12. Regularly visit and update the filtered lists when contact data changes or new criteria are defined.
13. Document the filtering criteria and the process used for each list for future reference.
14. If necessary, communicate with the marketing, sales, or customer service teams about the availability of the new filtered lists for their use.

Task | Scraping, Gathering New Data, and Updating Lists in CRM

Description of the Task: This task involves the collection of specific data to achieve the client's personal goals and objectives. The process involves the development of a criteria for the scraping and organization of data. Such data is then reviewed to ensure accuracy and completeness, and documented for reference. This system allows for efficient gathering of resources in order to help the client realize their entrepreneurial needs.

1. Determine the sources from which you'll scrape new data, such as websites, social media platforms, or other databases.
2. Work with your client or team to define the specific data requirements, including the type of information to be collected (e.g., contact details, leads, or customer data).
3. Choose appropriate web scraping tools or software to collect data efficiently. Tools like web scrapers or custom scripts may be used.
4. Configure the scraping parameters, such as keywords, search criteria, or specific websites to target. Ensure the parameters align with your defined data requirements.
5. Initiate the data scraping process to collect new information from the selected sources.
6. After scraping, review and clean the data to remove duplicates and ensure accuracy. Validate the data to confirm it's relevant and up to date.
7. Organize the newly scraped data into a structured format that aligns with the CRM's data fields.
8. Log in to the CRM system using your credentials.
9. Access the section of the CRM where the contact lists or data are to be updated.
10. Upload the cleaned and organized new data into the CRM. Many CRMs provide options for importing or updating existing contact lists.
11. Map the fields in your newly scraped data to the corresponding fields in the CRM to ensure data is correctly imported.
12. Review the data to ensure accuracy before confirming the update.
13. Execute the process to update or add the new data to the CRM's contact lists.
14. Verify that the data has been successfully updated in the CRM by checking for the new records.
15. Keep a record of the data scraping process and the CRM update, including any issues encountered and how they were resolved.
16. Communicate with the relevant team or client to inform them of the data update and provide any necessary reports.

Task | Ordering and Pooling Information from Government Websites

Description of the Task: This task involves a system of gathering needed information from identified government websites. Based on the client's needs, release of data is applied for and organized in a format that allows for easy data consumption and comprehension. The process maintains regular monitoring of the government websites to assure that the data is up to date, ensuring that access to needed information is always available to the organization.

1. Determine the specific government websites from which you need to gather information. These may include federal, state, or local government sites.
2. Collaborate with your client or team to define the specific data requirements, such as the type of information needed, categories, or keywords.
3. Use a web browser to access the identified government websites. Ensure you have the necessary permissions and access rights to obtain the data.
4. Utilize the search functionality or navigation on the government websites to find relevant information based on the defined data requirements.
5. Follow the procedures on the websites to either order or download the data. This may involve filling out forms or interacting with online databases.
7. Organize the downloaded data into a structured format that aligns with your client's needs or your project's requirements.
7. Review the data for duplicates, inaccuracies, or incomplete information. Clean and validate the data to ensure its quality.
8. If you are gathering data from multiple government websites, merge the information into a single dataset or database. Ensure data consistency and proper formatting.
9. Keep a detailed record of sources, data collection methods, and any specific instructions or terms of use associated with the data gathered.
10. Regularly back up the collected data to prevent loss in case of technical issues or data corruption.
11. Comply with relevant privacy and security regulations in handling the government data.
12. Provide reports to your client or team on the data collected and summarize how it aligns with the defined requirements.
13. Regularly monitor the government websites for updates or additional data that may be relevant to your project.
14. Maintain open communication with your client or team to discuss any issues, updates, or changes related to the data collection process.

Task | Assisting Corporate Filing, Registration, and Licensing Compliance

Description of the Task: This task involves the facilitation for compliance for corporate state filings, company registration, and real estate license application. It involves the management of necessary documents, application forms, research regulations, and organization of data. This system allows for the company to have efficient administration of such requirements.

1. Determine the specific corporate state filings, company registration, and real estate licensure requirements based on your client's needs and location.
2. Collect all the required information and documents for the filings. This may include legal documents, financial records, identification, and application forms.
3. Research the regulations, deadlines, and procedures related to corporate state filings and real estate licensure in the relevant state or jurisdiction.
4. Fill out the necessary application forms accurately, ensuring all information provided is correct and up to date.
5. Prepare and organize supporting documents, such as articles of incorporation, financial statements, and identification, as required by the state or licensing authority.
6. Submit the completed application forms and supporting documents to the appropriate state or government agency responsible for handling said corporate filings and licensure.
7. Pay any required fees or charges associated with the filings. Make sure payments are processed in compliance with state regulations.
8. Confirm receipt of said filings with the relevant authorities and retain copies of submission receipts.
9. Regularly check the status of your filings and licensure applications to ensure they are being processed in a timely manner.
10. If the state or licensing authority requests additional information or has questions, promptly respond and provide said requested details.
11. Keep open communication with your client, updating them on the progress of the filings and licensure applications.
12. Ensure that all documents and information submitted are in compliance with state laws and regulations.
13. Once the corporate state filings and licensure applications are approved, confirm the company's registration and real estate licensure.
14. Maintain accurate records of all filings, approvals, and correspondence for future reference and compliance purposes.

Task | Transcribing and Documenting Processes, Procedures, Workflows, and Templates

Description of the Task: This task involves assistance in the integral steps of transcribing and documenting key processes, procedures, workflows, and templates. The task allows for the creation of more uniform documentation of the company's development. Moreover, this task establishes a central repository or knowledge management system that ensures easy access to data and information.

1. Begin by identifying the specific processes, procedures, workflows, and templates that need to be transcribed and documented. This could include tasks within a specific department or for the entire organization.
2. Collect relevant information about the processes and procedures, including any existing documentation, workflow diagrams, or templates.
3. If necessary, observe the actual workflows and processes in action to gain a deep understanding of how they work.
4. Create an outline or structure for the documentation. Decide on the format you will use, such as written documents, flowcharts, or manuals.
5. Start transcribing the processes, procedures, and workflows. Use clear and concise language to describe each step and the expected outcomes.
6. If templates are part of the process, document their usage, instructions for filling them out, and any specific guidelines.
7. Incorporate visual aids such as flowcharts, diagrams, and screenshots to make the documentation more understandable.
8. Organize the information logically, making it easy for team members to follow and find the documentation they need.
9. Use a standardized language and terminology throughout the documentation to maintain consistency.
10. Review the documentation for accuracy and completeness. Ensure that it reflects the actual processes correctly.
11. Establish a central repository or knowledge management system where the documentation will be stored and accessible to team members.
12. If needed, provide training sessions or materials to educate team members on how to use the documented processes and templates effectively.
13. Regularly review and update the documentation to keep it current and reflective of updates in the processes.



HUMAN RESOURCES & RECRUITING

Task | Assisting Maintenance of Active Brokers License

Description of the Task: This task involves assistance in acquiring and renewing broker's renew licenses through continuing education courses. The task entails the creation of a comprehensive system of providing aid in registering for relevant programs, filling the required documents, and coordinating with course providers. The task allows for an overall simpler and more efficient application process.

1. Create a calendar outlining important license renewal dates and deadlines for all brokers within the organization.
2. Research and identify suitable continuing education courses and programs that align with the specific requirements for broker license renewal in the respective jurisdiction.
3. Assist brokers in registering for the said courses. This may involve filling out registration forms, making online reservations, or coordinating with course providers.
4. Ensure that brokers receive confirmation of their course registration. Verify the date, time, location, and any additional details for each course.
5. Request brokers to submit any required documentation, such as certificates of course completion, attendance records, or other relevant paperwork after finishing their courses.
6. Remind the brokers on upcoming courses, deadlines for completing courses, and submission of required documentation for license renewal.
7. Create a systematic method to organize and store all course completion certificates and records. This may involve digital filing, cloud storage, or physical file management.
8. Maintain a tracking system or spreadsheet to monitor the number of continuing education credits earned by each broker. Ensure they meet the minimum requirements for license renewal.
9. Assist brokers in preparing and submitting the broker license renewal application to the relevant licensing authority. Ensure all required documents are included.
10. Conduct a thorough review of the renewal application and supporting documents to ensure accuracy and completeness.
11. Help brokers process any necessary renewal fees or payments associated with the license renewal application. Ensure that payments are made on time.
12. Follow up with the licensing authority to confirm that the renewal application has been received and is in progress. Address any issues or discrepancies promptly.
13. Keep track of the status of each broker's license renewal. Once renewed, ensure that the updated licenses are received and properly filed.



MARKETING

Task | Publishing Blog Posts on the Website

Description of the Task: This task involves the strategic creation of impactful blog posts for the brand. This task is essential for putting out narratives, essays, and information out to the world. Through this task, the organization will be able to effectively communicate to its audience its identity, goals, and finally, its story.

1. Receive the finalized and edited blog post content from the content creator or writer. Ensure it is in the desired format and includes images, if applicable.
2. Log in to the content management system (CMS) or website backend using the provided credentials. Ensure you have the necessary permissions to add or edit content.
3. Inside the CMS, navigate to the section where new blog posts can be created. Click on "Add New Post" or a similar option.
4. Input the blog post title and any meta-information, including the meta title, meta description, and relevant keywords for search engine optimization (SEO).
5. Copy the prepared blog post content and paste it into the CMS editor. Ensure that formatting, fonts, and spacing are consistent with the website's style.
6. If the blog post includes images, videos, or other media, upload and insert them into the content. Adjust their placement and alignment as needed.
7. Format the text, headings, and subheadings using the built-in text editor. Ensure a consistent and visually appealing layout.
8. Review the blog post for spelling, grammar, and formatting errors. Make necessary edits to improve readability and grammar.
9. Choose or upload a featured image for the blog post. This image typically represents the content and is displayed on the blog's main page.
10. Categorize the blog post by selecting the relevant category or creating a new one. Add relevant tags to help organize and classify the content.
11. Optimize the blog post for SEO by ensuring that the meta-information aligns with best practices. Review keyword usage and ensure a search-friendly URL.
12. Preview the blog post to ensure it appears correctly on the website. Check for any formatting issues or broken links.
13. If satisfied with the preview, publish the blog post immediately or according to a decided schedule. If updating an existing post, click "Update" to save changes.
14. Share the published blog post on social media, newsletters, or other marketing channels to increase its visibility.

Task | Creating Templates for Tour/Property Survey Presentations

Description of the Task: This task involves the creation of strategic templates suitable for tour/property survey presentations. Ready to use templates and presentation formats are developed to benefit professional presentations for promotion and marketing. The formulated templates are ensured to fit any topic of presentation, incorporating key elements to assure effective and impactful presentations.

1. Determine the purpose of the tour or property survey presentation template. Determine the target audience, such as clients, potential buyers, or team members. Discuss this with the client.
2. Collect all essential information about the tour or property survey. This may include property details, survey data, photos, and any specific requirements for the presentation.
3. Choose a suitable presentation software, such as Microsoft PowerPoint, Google Slides, or Keynote, to create the template.
4. Start with a title slide that includes the name of the property or tour, your contact information, social media links and other relevant branding or logos.
5. Establish a consistent layout and styling for the presentation. Define fonts, colors, and visual elements to maintain a professional look.
6. Design section headers for different segments of the presentation, such as property details, survey findings, and recommendations.
7. Determine the structure for each type of slide, including text, images, and any additional media. Create placeholders for these elements to ensure consistency.
8. Design slides that provide an overview of the property, including its location, features, and any unique selling points.
9. Create slides for presenting survey data, charts, graphs, or images. Ensure clarity and visual appeal in conveying information.
10. If applicable, add photo gallery slides to showcase property images. Arrange images in an effective manner.
11. Include slides for recommendations, highlights, or key takeaways from the tour or property survey.
12. Carefully review and proofread the template for any errors, inconsistencies, or formatting issues.
13. Save the presentation as a template in the chosen software, allowing you to reuse it for future tours or property surveys.
14. Test the template by creating a sample presentation to ensure that all elements function as intended.
15. Share the template with the team members or colleagues who will use it for creating property tour or survey presentations.

Task | Writing and Submitting Press Releases

Description of the Task: This task involves the drafting of cohesive and compact press releases that grab attention and communicate the intended information effectively. The process entails the collection of relevant details, identification of target audience, strategic selection of a press release distribution service, and publication of impactful articles. The process assures an efficient and timely press release, essential for a successful marketing campaign.

1. Decide the purpose of the press release. Determine if it's to announce a new product, an event, a company update, or any other news-worthy information.
2. Collect all the necessary details for the press release, including key facts, quotes, contact information, and any relevant background information.
3. Identify the target audience and stakeholders who will be interested in the news. This could include customers, investors, industry publications, or the general public.
4. Select a reputable press release distribution service or platform to submit the press release. Common options include PR Newswire, Business Wire, and PRWeb.
5. Create a compelling and concise headline that summarizes the main news or announcement. Make it attention-grabbing.
6. Write the press release body, following a standard format: start with a dateline, lead paragraph (answering the who, what, where, when, why), body text with additional details, quotes, and background information.
7. Incorporate quotes from key individuals involved in the news, such as the CEO, spokesperson, or experts. Ensure that the quotes add value and authenticity to the release.
8. If applicable, optimize the press release for search engines (SEO). Include relevant keywords and phrases naturally within the content.
9. Include the contact information of a designated spokesperson or media contact for inquiries. This should include a name, phone number, email address, and a link to the company website.
10. Effectively proofread and edit the press release to ensure accuracy, clarity, and adherence to the Associated Press (AP) Style or any specific style guidelines.
11. Add a brief company or organization boilerplate at the end of the press release. This provides background information about the company.
12. If possible, select an engaging image to accompany the press release. Ensure it is high-quality and relevant to the news.
13. Determine the date and time for the press release distribution. Consider peak time of when your target audience is most likely to engage with said news.
14. Submit the press release to the chosen press release distribution service.
15. Monitor the performance of the press release. Track mentions, engagement, and coverage. Be prepared to respond to media inquiries or requests for interviews.

Task | Creating GIS Maps and 3D Renderings for Real Estate Project

Description of the Task: This task involves the production of Geographic Information System (GIS) maps and 3-dimensional models for various real estate deliverables. The process involves an understanding of the client's goals and objectives, and a production of models based on such expectations. Such accurate visual representations aid the target audience in understanding the prospects the real estate may offer.

1. Collect all relevant project information from the client, including property dimensions, features, and any specific requirements.
2. Obtain geographic data sources such as GIS shapefiles, property survey data, aerial imagery, and any other data necessary for creating accurate maps.
3. Select appropriate GIS software, such as ArcGIS, QGIS, or other GIS platforms, based on the project requirements and your expertise.
4. Import the acquired geographic data into the GIS software. Ensure that all data layers are accurately loaded.
5. Start by creating a base map that represents the project area and its surroundings. Include property boundaries, roads, water bodies, and relevant landmarks.
6. Customize the GIS layers to display specific project features like buildings, infrastructure, landscaping, and zoning information.
7. Design the layout of the GIS map, including the title, legend, scale, and any additional elements required for clarity. Include labels and annotations to provide context and information on key project elements.
8. If 3D renderings are required, utilize 3D modeling software like SketchUp, Blender, or specialized GIS software that supports 3D visualization.
9. Create 3D models of the real estate project, including buildings, landscapes, and other structures, based on project specifications.
10. Render high-quality 3D images or videos of the project from different angles and perspectives.
11. Review the GIS maps and 3D renderings for accuracy and completeness. Make necessary refinements based on client feedback.
12. Format the GIS maps and 3D renderings into the required file types (e.g., PDF, JPEG, or interactive web maps). Ensure they meet the project's deliverable specifications.
13. Present the GIS maps and 3D renderings to the client for review and approval. Address any client revisions or feedback to ensure the final project deliverables meet their expectations.
14. Provide the client with the final GIS maps and 3D renderings in the agreed-upon format and resolution.



MARKETING

Task | Researching List of Target Companies for Decision Maker Contact Information

Description of the Task: This task involves the compilation and organization of decision maker contact information for the company's perusal. Based on the client's needs, the task will develop a process of effective gathering of needed information. Such will allow the company to strategically create informed decisions and increase overall sales.

1. Begin by clarifying the specific criteria and objectives for researching target companies on the list chosen by the client. Determine the decision maker roles you need to find contact information for.
2. Obtain the list or access it from a reputable source.
3. Review the list and identify the companies that match your client's criteria and business objectives.
4. Identify the decision maker roles within these target companies. These roles may include managing partners, senior partners, or directors.
5. Utilize online research tools and platforms like LinkedIn, professional networking websites, or legal industry directories to find decision maker profiles within the target companies.
6. Collect contact information such as email addresses, phone numbers, and LinkedIn profiles for the identified decision makers. Ensure that the information is up-to-date and accurate.
7. Verify the accuracy of the contact information by cross-referencing it with multiple sources. It's important to ensure that the details are current.
8. Organize the collected contact information in a structured format, such as a spreadsheet or database, making it easy to access and use.
9. Document the sources where the contact information was found. Documentation is important for reference and quality assurance.
10. Create profiles for each decision maker. Include their names, roles, contact information, and any additional relevant details.
11. Ensure that your research complies with legal regulations and data privacy laws, especially when collecting and storing personal contact information.
12. Conduct quality assurance checks to confirm that the contact information is accurate and complete.
13. Provide a detailed report to your client that includes the decision maker contact information for the target companies.
14. Regularly check and update the contact information over time. Keeping the data current is essential for ongoing outreach efforts.

Task | Data Scraping for Targeted/Local Marketing Opportunities

Description of the Task: This task involves the systematic collection and organization of relevant data. This task is paramount for building an essential knowledge repository, where data is arranged to be accessible and easy to consume. Such availability of data allows the organization to craft strategic and informed marketing campaigns that will ultimately drive business growth.

1. Start by defining the specific criteria for your targeted leads or local marketing opportunities. This includes location, industry, company size, or any other relevant factors.
2. Determine the online sources from which you'll be scraping data. This could include websites, directories, social media platforms, or other online databases.
3. Select and set up web scraping tools or software that are suitable for your data sources. Tools like web scrapers or data extraction software can be helpful.
4. Configure the scraping parameters, such as keywords, search filters, and location settings, to narrow down the data you're looking for.
5. Run the web scraping tools to gather data from the chosen online sources. Ensure that the tools are set to extract the specific information you need.
6. Collect data on potential leads or local marketing opportunities, including contact information, company details, and any other relevant data.
7. Clean and refine the scraped data to remove duplicates, irrelevant information, or any inaccuracies.
8. Verify the accuracy of the collected data by cross-referencing it with multiple sources, if possible.
9. Organize the scraped data into a structured format, such as a spreadsheet or database, making it easy to access and use.
10. Document the sources from which you scraped the data. Proper documentation is essential for reference and quality assurance.
11. Ensure that your data scraping process complies with legal regulations and data privacy laws, particularly when dealing with personal or sensitive information.
12. Create a report or presentation that presents the collected data for targeted leads or local marketing opportunities.
13. Based on the data you've collected, take any necessary follow-up actions, such as initiating outreach or marketing campaigns.
14. Regularly check and update the scraped data to keep it current. This is crucial for ongoing marketing efforts.
15. Monitor the effectiveness of your marketing campaigns or lead generation efforts and make adjustments as needed.

Task | Collecting Data on Lenders and Buyers for Projects and Emailing Prospects

Description of the Task: This task involves the gathering of relevant data and systematically organizing them according to an agreed format with the client. Collected data is cleaned, reviewed, and categorized for easier access and consumption. A database is then developed in which the organization is able to conduct effective and strategic marketing projects and emailing campaigns based on the data curated.

1. Start by defining the specific criteria for your lender and buyer lists. Consider factors such as location, industry, investment preferences, or any other relevant criteria.
2. Determine where you can source data for potential lenders and buyers. This may include real estate directories, online databases, industry-specific platforms, or existing contact lists.
3. Select and set up tools or software that can help you build and manage lists. Customer Relationship Management (CRM) systems or spreadsheet software can be useful.
4. Develop parameters for the lists, such as the types of lenders and buyers you're targeting, geographic regions, or investment amounts.
5. Begin collecting data on potential lenders and buyers. Include their contact information, investment history, and preferences.
6. Clean and refine the collected data to remove duplicates, inaccuracies, or any irrelevant information.
7. Verify the accuracy of the collected data by cross-referencing it with reliable sources and ensuring that contact details are up-to-date.
8. Organize the lender and buyer lists into a structured format, such as a spreadsheet or CRM database, making it easy to manage and segment.
9. Document the sources from which you obtained the data. Proper documentation is essential for reference and compliance.
10. Develop an email outreach strategy to engage with prospects. Determine the email content, messaging, and goals for the outreach.
11. Create professional and engaging email templates tailored to your lender and buyer lists. Personalize these templates as needed.
12. Use email marketing software or a CRM to send out personalized emails to your prospects. Segment the lists as required for targeted outreach.
13. Monitor email responses and follow up with prospects who show interest or request additional information.
14. Implement tracking mechanisms to monitor the effectiveness of your email campaigns. Track open rates, click-through rates, and responses.

Task | Assembling Client Presentations and Sales Books

Description of the Task: This task involves crafting visually appealing and impactful presentations and sales books based on the goals and objectives of the organization. The process entails a thorough understanding of the brand and an incorporation of relevant topics and industry topics to develop effective marketing materials.

1. Determine and understand the requirements and objectives of the client's presentations and sales books.
2. Research relevant topics, industry trends, and data that can be included in the presentations.
3. Collect data, statistics, case studies, and any other relevant information needed to support the content.
4. Develop an outline for the client presentation, including key sections, topics, and the flow of information.
5. Gather visual assets such as images, graphs, charts, and illustrations that will enhance the presentation.
6. Organize the collected data and content into a structured format that aligns with the presentation outline.
7. Create professional and visually appealing presentation slides using software like PowerPoint, Google Slides and more.
8. Proofread and edit the content and slides for accuracy, clarity, and consistency.
9. If creating sales books, assemble individual sections or chapters that focus on different aspects of the sales book.
10. Design the layout and format of the sales book, ensuring it is cohesive and visually appealing.
11. Integrate visual assets, such as images and charts, with the textual content in the sales book.
12. Review the entire presentation and or sales book to ensure it meets the client's expectations and objectives.