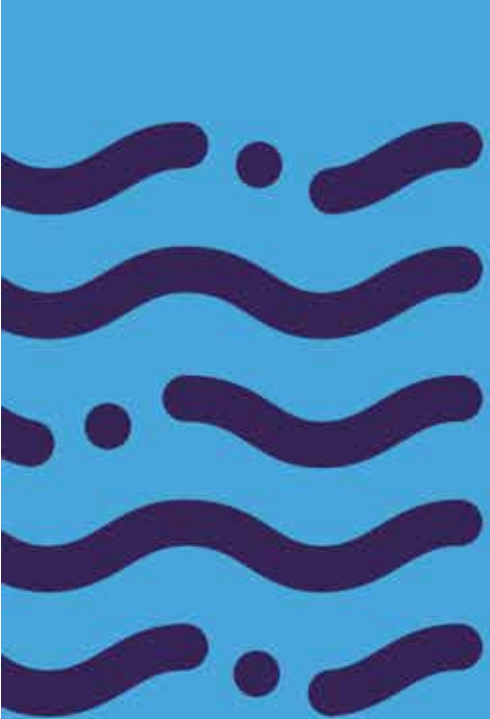


Client Processes Playbook





CONTENTS.

03 About the Playbook

VA Playbook Proper

04 Marketing

- 05 Creating Infographics via Canva
- 06 Setting Up G-text Campaigns
- 07 Managing Instagram Automatic Campaigns
- 08 Compiling and Distributing Local Market Update Newsletter
- 09 Preparing Marketing Packets
- 10 Editing Videos for the Market Update Newsletter

11 Operations

- 12 Managing Escrow and Maintaining Vendor Contacts
- 13 Assisting in Escrow and Pre-Listings Maintenance
- 14 Conducting Constant Contact and HubSpot Data Cleanup
- 15 Responding to LinkedIn Messages

16 Administrative

- 17 Conducting Accommodation Research
- 18 Facilitating Data Input for Holiday Gift Distribution
- 19 Researching Event Planners

20 Sales

- 21 Sending Follow-Up Emails to Client Network
- 22 Sending "What to Expect" Booklet to Recent Home Buyers

23 Training

- 24 Assisting with Residential Real Estate Training



MARKETING

Task | Creating Infographics via Canva

Description of the Task: In this task, our team focuses on graphic design, a process where we craft visual elements for various purposes. This includes designing logos, marketing materials, and digital assets. Our graphic designers bring creativity and expertise to transform ideas into visually compelling de-

branding, advertising, and online presence, ensuring effective communication and leaving a lasting impression on your audience.

1. Understand the client's visual content needs, including the purpose, target audience, branding guidelines, and preferred design style.
2. Ensure access to the company's Canva account.
3. Collect detailed requirements for the specific visual content projects, including dimensions, format, and content specifications.
4. Plan the design elements, layout, and visual hierarchy based on the project's objectives and target audience.
5. Create visual content, which may include graphics, illustrations, infographics, banners, social media posts, or any other design assets.
6. Integrate the client's branding elements such as logos, color schemes, and typography into the visual content.
7. Select appropriate fonts and layout for text elements to ensure readability and visual appeal.
8. Edit and enhance images if needed, adjusting colors, brightness, and contrast to achieve the desired effect.
9. Share draft designs with the client for their review and feedback. Make necessary revisions based on their input.
10. Incorporate any client feedback and make final adjustments to the visual content.
11. Export the completed visual content in the required formats (e.g., JPEG, PNG, PDF) and save them for future use.
12. Leverage design tools to ensure that the visual content is optimized for its intended platform or medium.
13. Perform a final quality check to ensure that the visual content meets the client's specifications and is error-free.
14. Provide the finalized visual content to the client in the agreed-upon format and method, such as email, cloud storage, or a content management system.
15. Create backups and archives of the design files to prevent data loss and facilitate future revisions or updates.

Task | Setting Up G-text Campaigns

Description of the Task: This task involves the establishment of G-text campaigns, a powerful tool for reaching out to clients and prospects via SMS marketing. It includes configuring campaign parameters, crafting compelling text messages, and managing the distribution to effectively engage with the target audience.

1. Begin by understanding the purpose and goals of the G-text campaign. Common objectives include promoting a product/service, driving traffic to a website, generating leads, or increasing brand awareness.
2. Ensure you have explicit permission from customers to send them text messages. This can be done through opt-in forms or subscription processes.
3. Segment the target audience based on factors such as demographics, preferences, past behavior, and engagement level to deliver more personalized messages.
4. Create clear, concise, and engaging messages that align with the campaign objectives and resonate with the target audience.
5. Determine the appropriate timing for sending text messages. Avoid sending messages during late-night or early-morning hours to respect recipients' privacy.
6. Utilize text message marketing platforms that offer automation features to schedule and send messages at specific times or trigger them based on user actions.
7. Conduct A/B testing with different message variations to identify the most effective content and optimize the campaign's performance.
8. Monitor the campaign's performance by tracking metrics like open rates, click-through rates, conversions, and overall engagement.
9. Analyze the campaign's data to identify areas for improvement. Use insights to optimize future messages and campaign strategies.
10. Ensure compliance with relevant regulations and guidelines, such as the Telephone Consumer Protection Act (TCPA), to avoid legal issues.
11. Include an opt-out option in each message to allow recipients to unsubscribe from further communications if they wish.
12. Integrate the G-text campaign with other marketing channels (e.g., email, social media) to create a cohesive and consistent marketing strategy.
13. Keep an eye on message deliverability to ensure that messages are reaching the intended recipients without being flagged as spam.
14. Monitor responses and feedback from recipients. Respond to any inquiries or concerns promptly to maintain a positive customer experience.
15. Continuously iterate and improve the G-text campaign based on data, customer feedback, and changing marketing dynamics.

Task | Managing Instagram Automatic Campaigns

Description of the Task: This task revolves around the strategic planning and execution of automated marketing campaigns on Instagram. It entails the continuous monitoring and fine-tuning of these campaigns to ensure they align with the brand's goals and resonate with the target audience.

1. Select a reputable Instagram automation tool or social media management platform that offers automation features for Instagram. Some popular options include Hootsuite, Buffer, Later, and SocialBee.
2. Ensure you have access to the client's Instagram account or the necessary permissions to manage it on their behalf.
3. Develop a content calendar with a schedule of planned posts and campaigns. Decide on the frequency of posting and the types of content to be shared.
4. Use the automation tool to schedule Instagram posts in advance. Specify the date and time for each post to be published.
5. Collect or create high-quality visual content, such as images, graphics, and videos, that align with the campaign objectives and resonate with the target audience.
6. Craft engaging and relevant captions for each post. Include relevant hashtags to expand the reach of the posts.
7. Some automation tools provide hashtag suggestions based on the content or target audience. Utilize these features to enhance post visibility.
8. Regularly monitor post engagement, including likes, comments, and shares. Respond to comments and engage with the audience to build relationships.
9. Some automation tools allow you to send automated direct messages to new followers or specific segments of your audience.
10. Utilize the analytics provided by the automation tool to track post performance, audience growth, and overall campaign effectiveness.
11. Based on the campaign's performance data, adjust the posting schedule, content strategy, and targeting to optimize results.
12. Some automation tools offer the ability to schedule Instagram Stories in advance. Use this feature to maintain consistency and save time.
13. Keep an eye on any potential issues or errors that may arise from automation. Address and resolve them promptly.
14. Ensure that all posts and content align with the client's brand guidelines and maintain a consistent brand identity.

Task | Compiling and Distributing Local Market Update Newsletter

Description of the Task: This task involves collecting, organizing, and distributing information regarding local market trends, developments, and updates to create engaging newsletters. The goal is to provide subscribers with valuable, up-to-date information about the local market, fostering engagement and changes and opportunities.

1. Begin by defining the newsletter's purpose and identifying the target audience, whether it's meant to inform, educate, or engage clients, prospects, or industry professionals.
2. Gather relevant local market data from sources like real estate reports, industry news, and market research to extract statistics, trends, and valuable insights.
3. Organize and summarize this data using tools like Microsoft Excel or Google Sheets, creating clear presentations, summaries, charts, or infographics.
4. Choose a suitable email marketing platform such as MailChimp, Constant Contact, or HubSpot, ensuring it offers customizable templates and automation features.
5. Customize the newsletter template to align with your brand's style, adding content, headlines, images, and well-structured data summaries.
6. Craft engaging content, including compelling headlines and introductory paragraphs, while presenting data and insights in an easily digestible format.
7. Carefully proofread and edit the newsletter for spelling, grammar, and formatting errors, ensuring a professional and polished appearance.
8. Test the newsletter by sending sample emails to yourself or a small group to check for formatting and link accuracy, and verify it looks appealing on both desktop and mobile devices.
9. Segment your email list into relevant groups, such as clients, prospects, or specific regions, and tailor the newsletter content accordingly.
10. Schedule the newsletter for regular publication, whether it's monthly, quarterly, or another suitable frequency, using your chosen email marketing platform.
11. Monitor engagement metrics like open rates and click-through rates provided by your email marketing platform to gauge reader interest.
12. Encourage readers to provide feedback and suggestions for improvement and use this valuable input to enhance future newsletters.
13. Follow up with readers through additional emails or surveys to collect further insights, using the feedback to continually refine your local market update newsletter.

Task | Preparing Marketing Packets

Description of the Task: This task involves compiling and organizing essential promotional materials and information to create comprehensive packets or kits for marketing purposes. The goal is to ensure that all necessary documents, brochures, flyers, product samples, and any other relevant materials are

in a structured packet, making it easier to convey key messages and make a positive impression on recipients.

1. Collect all relevant information about the company, including its features, amenities, location, target audience, pricing, and any unique selling points.
2. Determine the contents of the marketing packet based on the gathered information. It may include an introduction, property details, images, testimonials, pricing, contact information, and more.
3. Design an attractive cover page featuring the company's name and an eye-catching image that represents the property or business.
4. Craft a compelling introduction to the company, highlighting its uniqueness, benefits, and what sets it apart from competitors.
5. Include a detailed description of the company, its facilities, services, and any activities offered to potential customers.
6. Incorporate high-resolution images of the company, showcasing its beauty, amenities, and surroundings.
7. If available, include customer testimonials or reviews that showcase positive experiences with the company.
8. Provide information on various pricing options, packages, or special offers related to the company.
9. Add contact details, such as phone numbers, email addresses, and a website link for potential clients to reach out.
10. Organize the information in an aesthetically pleasing layout, using a mix of text, images, and formatting for easy readability.
11. Review the content and design for errors, consistency, and overall quality. Ensure that all information is accurate and up-to-date.
12. Share the draft marketing packet with the relevant stakeholders or clients to get their feedback and approval.
13. Make any necessary changes based on the feedback received and finalize the marketing packet. Save it in a suitable file format.
14. Share the marketing packet electronically or in print, depending on the distribution strategy, to potential clients, partners, or investors.
15. Keep the marketing packet up-to-date with any changes or improvements related to the company.
16. Track the effectiveness of the marketing packet by analyzing its impact on lead generation and customer engagement.

Task | Editing Videos for the Market Update Newsletter

Description of the Task: This task involves editing videos intended for the Market Update Newsletter. This includes adding graphics, subtitles, transitions, and optimizing audio quality. The aim is to create video content that not only conveys the latest market insights effectively but also captivates the audience's engaging multimedia experience.

1. Obtain the raw video footage from the client, which may include recorded market updates, property tours, interviews, or any other relevant content.
2. Watch and review the raw footage to understand the content and identify the key segments that need to be included in the final video.
3. If necessary, create a script or outline for the video to ensure a clear and structured flow of information.
4. Use video editing software to trim unnecessary sections, cut out mistakes or irrelevant content, and ensure the video flows smoothly.
5. Enhance the video by adding transitions between scenes, text overlays, graphics, and any other effects that align with the client's branding.
6. If available, include additional B-roll footage to complement the main content and make the video visually engaging.
7. Ensure that the audio is clear and balanced. Remove background noise if necessary and add background music if desired.
8. Add an introduction with the client's branding and logo and include an outro with a call-to-action or contact information.
9. Ensure that the final video is concise and within the desired duration, typically between 2 to 5 minutes for market update videos.
10. Review the edited video to check for any errors or inconsistencies. Make necessary edits to refine the final product.
11. Export the edited video in the desired format and resolution suitable for the client's distribution platform (e.g., YouTube, social media, website).
12. Share the edited video with the client for their review and approval. Make any required changes based on their feedback.
13. Once the client approves the video, share it on the designated platforms, website, or through email campaigns.
14. Monitor the video's performance, such as views, engagement, and feedback, to assess its impact and make improvements for future videos.
15. Ensure that all project files, including the raw footage and edited video, are securely backed up for future reference.



OPERATIONS

Task | Managing Escrow and Maintaining Vendor Contacts

Description of the Task: This task involves overseeing the financial aspects of transactions while keeping a well-organized record of vendor information. This includes handling funds in a secure and efficient manner, ensuring compliance with financial regulations, and maintaining up-to-date vendor details for seamless communication and collaboration.

1. Familiarize yourself with the escrow process, which involves holding funds or assets in a third-party account until certain conditions are met.
2. Obtain a list of vendor contacts from your client or relevant stakeholders. This list may include vendors providing goods, services, or other resources.
3. Create a spreadsheet or use a CRM (Customer Relationship Management) tool to organize and store vendor contact information, including names, company names, email addresses, phone numbers, and any additional details.
4. Regularly update the vendor contact list to ensure accuracy. Notify vendors of any changes to your client's contact information.
5. Work with the escrow service provider to initiate and manage the escrow process for relevant transactions involving vendors.
6. Monitor payment deadlines and ensure that funds are transferred to vendors within the agreed-upon timelines.
7. Confirm that vendors deliver the goods or services as specified in the agreements before releasing funds from escrow.
8. In case of any disputes between your client and vendors, act as a mediator and work towards finding a resolution that satisfies all parties involved.
9. Keep a record of all escrow transactions, including payment dates, amounts, and details of the vendor's deliverables.
10. Assist in preparing and managing the necessary documentation for each escrow transaction, including invoices, contracts, and proof of delivery.
11. Follow up with vendors and the escrow service provider to ensure all required actions are completed in a timely manner.
12. Nurture positive relationships with vendors by being responsive, attentive, and professional in all communications.
13. Ensure that all sensitive information related to escrow transactions and vendor contacts is treated with confidentiality and stored securely.
14. Keep your client informed about the status of escrow transactions and any relevant updates regarding vendors.
15. Continuously assess the efficiency and effectiveness of your escrow management process, and seek feedback from your client to make improvements.

Task | Assisting in Escrow and Pre-Listings Maintenance

Description of the Task: This task entails actively participating in the process of safeguarding financial assets and property records before listing them in the market. This includes verifying and organizing essential documents, coordinating inspections and repairs, and ensuring that all necessary prerequisites

listing.

1. Collect and review all necessary documents related to the property, including title deeds, mortgage information, surveys, property tax records, and any outstanding liens.
2. Schedule and coordinate property inspections, such as home inspections, pest inspections, and appraisals, as required.
3. Coordinate any necessary repairs or maintenance tasks to ensure the property is in optimal condition before listing.
 - a. Obtain quotes from contractors and schedule repair work.
4. Assist in setting up an escrow account, if required, to hold funds securely during the transaction process.
5. Conduct title research to identify any title issues or encumbrances that need to be resolved before listing.
 - a. Coordinate with title companies to clear any title issues.
6. Prepare and ensure the timely delivery of disclosure documents required by law, such as property condition reports and lead-based paint disclosures.
7. Ensure that all necessary legal and regulatory requirements are met during the escrow and pre-listing process.
8. Coordinate property staging to enhance its visual appeal and create a favorable impression for potential buyers.
9. Arrange professional photography and create marketing materials, including brochures and online listings.
10. Create a detailed timeline for each step of the escrow and pre-listing process, ensuring that deadlines are met.
11. Keep track of all documentation and correspondence related to the escrow and pre-listing activities.
12. Arrange for virtual tours or video walkthroughs of the property to provide potential buyers with an immersive experience.
13. Coordinate showings of the property, ensuring that it is well-presented and accessible to interested buyers.
14. Assist the real estate agent with negotiations and offer presentations during the escrow process.
15. Prepare the necessary contracts and paperwork for the sale, ensuring accuracy and compliance.
16. After the sale is completed, provide post-escrow support, including coordinating final walkthroughs and addressing any outstanding issues.

Task | Conducting Constant Contact and HubSpot Data Cleanup

Description of the Task: This task involves actively reviewing, refining, and optimizing contact databases within the Constant Contact and HubSpot platforms. This includes tasks such as removing duplicate entries, updating outdated contact information, segmenting lists for more targeted communication, email marketing and customer relationship management efforts.

1. Export the contact database from Constant Contact or HubSpot to a spreadsheet. This will serve as the working copy for data clean up.
2. Identify and remove any duplicate contacts from the spreadsheet. Merge the information for contacts with multiple entries.
3. Check each contact's information, including email addresses, names, phone numbers, and addresses. Correct any inaccuracies or incomplete data.
4. Ensure that all contact data is in a standardized format, such as capitalizing names, using consistent date formats, and formatting phone numbers.
5. If the database is extensive, consider segmenting contacts into groups based on criteria like location, interests, or engagement level.
6. Remove any contacts who have not engaged with emails or have unsubscribed to keep the list current and avoid sending unwanted communications.
7. Verify that all contacts have given explicit consent to receive communications. Remove contacts who have not opted in.
8. Assign relevant tags or categories to contacts to make it easier to target them with specific content in future campaigns.
9. Analyze email engagement metrics to identify contacts who consistently do not open emails or have low engagement rates. Consider re-engagement strategies or removing inactive contacts.
10. After cleaning up the spreadsheet, import the cleaned data back into Constant Contact or HubSpot, overwriting the existing database.
11. Send a test email to a small segment of the cleaned database to ensure deliverability and check for any issues.
12. Continuously monitor the contact database for new data or changes. Regularly perform data clean up to maintain data accuracy.
13. Keep a record of the data clean-up process, including any changes made and any issues encountered, for future reference.
14. Before performing any major data changes or imports, create a backup of the contact database for safety.
15. Continuously review data management processes and seek feedback to improve the efficiency and accuracy of data clean up.

Task | Responding to LinkedIn Messages

Description of the Task: This task involves promptly engaging with incoming messages on the LinkedIn platform. This task aims to maintain active and responsive communication with connections, colleagues, and potential leads on LinkedIn, fostering professional relationships and ensuring timely responses to

quests.

1. Clarify the purpose of sending daily LinkedIn messages. Is it for lead generation, networking, building relationships, or promoting a specific offer or event?
2. Develop a personalized but general message template that aligns with your client's communication style and goals.
3. Customize each message by addressing the recipient by their name and mentioning any relevant details from their profile or previous interactions.
4. Adhere to LinkedIn's messaging guidelines and avoid sending unsolicited or spammy messages.
5. Send the LinkedIn messages at a time when recipients are more likely to be active and responsive on the platform.
6. Keep track of the responses and engagement from recipients. Respond to inquiries and engage in conversations promptly.
7. If your client has a LinkedIn Premium account, leverage features like InMail to reach out to people outside of their immediate network.
8. Alongside personalized messages, share valuable content such as blog posts, articles, or webinars that align with your client's industry or expertise.
9. While it is essential to streamline your outreach, avoid excessive automation that may come across as impersonal or robotic.
10. Ensure that any personal information shared by recipients during interactions is treated with confidentiality and stored securely.
11. Keep all interactions professional, respectful, and focused on providing value to the recipient.
12. If your client is using LinkedIn InMail, be aware of the daily or monthly limit and manage outreach accordingly.
13. Keep track of the results and engagement from the daily LinkedIn messages. Analyze the success of the campaign and adjust your strategy as needed.
14. Follow up with connections who show interest or engage with your messages to nurture relationships further.
15. Regularly update your client on the progress of the LinkedIn messaging campaign and seek feedback to make improvements.
16. Continuously optimize your LinkedIn messaging strategy based on data, feedback, and changing networking trends.



ADMINISTRATIVE

Task | Conducting Accommodation Research

Description of the Task: In this task, thorough research is conducted to identify and assess various accommodation choices that align with clients' preferences and requirements. The gathered information is meticulously organized in a spreadsheet, ensuring that clients have a comprehensive overview of

the decision-making process efficient and tailored to their needs.

1. Start by understanding your client's preferences and requirements for accommodation, such as location, budget, amenities, and any specific preferences they may have.
2. Use search engines, online travel platforms (e.g., Booking.com, Airbnb, Expedia), and hotel websites to find accommodation options that match your client's criteria.
3. Collect relevant details for each accommodation option, including name, address, contact information, room types, rates, amenities, and any special offers or discounts.
4. Read reviews and ratings from previous guests to ensure the quality and reputation of the accommodation options.
5. Ensure that the accommodation offers the amenities that are important to your client, such as Wi-Fi, parking, breakfast, fitness facilities, etc.
6. Verify the availability of rooms for the client's desired dates and check if there are any restrictions or blackout dates.
7. Open a spreadsheet and create columns for accommodation name, address, contact details, room types, rates, amenities, reviews, and any other relevant information.
8. Enter the researched information into the spreadsheet for each accommodation option, filling out the corresponding columns.
9. Include any additional notes or comments about the accommodation options, such as proximity to attractions or specific recommendations.
10. Analyze the information in the spreadsheet to compare different accommodation options. Shortlist the best choices that align with your client's preferences.
11. Prepare a summary or presentation of the shortlisted accommodation options and share it with your client for their review and decision-making.
12. Once your client selects their preferred accommodation, proceed to make the necessary reservations through the chosen booking platform or directly with the accommodation provider.
13. Be prepared to answer any questions your client may have about the accommodation options and assist with any changes or special requests.
14. Maintain open communication with your client throughout the accommodation selection process, keeping them informed of any updates or changes.
15. Ensure that any personal information provided by the client or obtained during the research process is treated with confidentiality and stored securely.

Task | Facilitating Data Input for Holiday Gift Distribution

Description of the Task: In this task, data input for holiday gifts is meticulously managed within the HubSpot and Constant Contact platforms. This involves organizing and inputting all relevant information related to holiday gift recipients, ensuring that the data is accurately recorded and readily accessible for effective gift distribution.

1. Clarify with your client the list of recipients for the holiday gifts and the information needed for each recipient, such as name, email address, mailing address, gift preferences, etc.
2. Open a spreadsheet (e.g., Excel, Google Sheets) to organize the recipient data. Create columns for each data field, such as name, email, address, gift preferences, etc.
3. Collect all recipient data from various sources provided by your client, such as emails, CRM systems, or previous gift lists.
4. Enter the recipient information into the corresponding columns in the spreadsheet. Double-check for accuracy and completeness.
5. If your client uses HubSpot, import the recipient data from the spreadsheet into the CRM system. Use the "import contacts" feature in HubSpot to facilitate this process.
6. If your client uses Constant Contact for email marketing, create separate holiday gift lists or segments based on the recipient data to ensure targeted communication.
7. Use Constant Contact to send personalized holiday gift emails to each recipient, addressing them by their name and mentioning their gift preferences (if applicable).
8. Monitor the email engagement metrics in Constant Contact, such as open rates and click-through rates. Track responses or inquiries related to the holiday gifts.
9. Based on the recipient data, prepare the holiday gift packages according to each recipient's preferences. Ensure that the gifts are packaged securely and appropriately.
10. Arrange for the delivery of the holiday gifts to each recipient's address. Ensure timely delivery and track shipping status if possible.
11. Mark the status of the gift recipients as "Gift Sent" in HubSpot, and update Constant Contact lists to reflect the gift delivery.
12. Follow up with recipients to confirm the receipt of the gifts and address any feedback or issues that may arise.
13. Ensure that all recipient data is handled with utmost security and confidentiality. Encrypt sensitive information and protect it from unauthorized access.
14. Prepare and share reports with your client on the holiday gift campaign's success, including email engagement metrics, delivery status, and any feedback received.
15. After the holiday gift campaign, update the recipient data in HubSpot and Constant Contact to maintain accurate records for future communications.

Task | Researching Event Planners

Description of the Task: In this task, the objective is to conduct comprehensive research to identify potential event planners, initiate communication with them using carefully crafted emails tailored to their needs, and extend professional connections through LinkedIn. This proactive approach aims to establish

ning industry, fostering collaboration and networking opportunities for future endeavors.

1. Start by conducting research to find relevant event planners in the target industry or location. Look for professionals with experience in organizing events similar to the one you are planning.
2. Create a list of potential event planners, including their names, email addresses, LinkedIn profiles, and any other relevant contact information.
3. Prepare a professional and personalized boilerplate email that introduces yourself or your client, briefly explains the event, and expresses interest in connecting with the event planner.
4. Personalize the boilerplate email for each event planner by addressing them by name and mentioning any specific details that demonstrate your knowledge of their work.
5. Use the list you created to send the boilerplate email to the event planners. Be mindful of any specific email preferences they may have, such as using a specific subject line.
6. After sending the email, follow up by sending connection requests on LinkedIn to the event planners you contacted. Include a brief note reminding them of the email you sent.
7. Show genuine interest in the event planners' work by engaging with their LinkedIn posts, liking, commenting, or sharing relevant content.
8. If you don't receive a response to the initial email or LinkedIn connection request, consider sending a polite follow-up message after a reasonable period.
9. Maintain a spreadsheet or CRM system to track your outreach efforts, responses, and any other relevant interactions with event planners.
10. Throughout the process, maintain a professional and courteous tone in all your interactions. Respect event planners' time and boundaries.
11. While reaching out to event planners, consider networking with other professionals in the industry who can provide valuable insights and recommendations.
12. Stay organized and manage your communications efficiently to avoid duplicate outreach or overlooking any important follow-ups.
13. Stay informed about industry trends and developments to have relevant discussions with event planners and demonstrate your expertise.
14. Be prepared to offer value in your interactions with event planners, whether it's sharing helpful resources or exchanging insights on successful events.
15. Continue reaching out to event planners and building relationships even after the initial campaign, as networking is an ongoing process.

SALES



Task | Sending Follow-Up Emails to Client Network

Description of the Task: This task involves actively nurturing and strengthening client relationships by regularly sending follow-up emails and strategically connecting with valuable contacts within the client's network. The primary goal is to maintain a strong rapport with clients, ensuring they feel valued and in-

uncover potential opportunities or partnerships that align with the client's objectives.

1. Obtain the list of contacts from your client, including their names and email addresses. Make sure the list is accurate and up-to-date.
2. Understand the purpose of the follow-up emails. It could be to thank contacts for attending an event, inquire about their interest in a product or service, or provide updates on a project.
3. Create a professional and personalized follow-up email template that aligns with your client's communication style and objectives.
4. Personalize each follow-up email by addressing the recipient by their name and mentioning any specific details related to your client's previous interaction with them.
5. Include any relevant information or attachments that the recipient might find helpful, such as links to resources, additional materials, or upcoming events.
6. Use an email marketing platform or your client's email account to send the follow-up emails to the contacts on the list.
7. Schedule the follow-up emails strategically, considering the best time of day and day of the week to maximize open and response rates.
8. Follow email etiquette, including a clear subject line, a brief and concise message, and a professional sign-off.
9. If recipients respond to the follow-up emails, personalize your responses accordingly and address any specific inquiries or concerns they may have.
10. Keep track of email responses, noting any positive feedback, inquiries, or requests for further information.
11. If your client's network is extensive, consider segmenting contacts based on their interests or interactions to tailor future communications.
12. Offer value to your client's network through helpful resources, insights, or invitations to relevant events or webinars.
13. Ensure consistency in communication by regularly sending updates, newsletters, or announcements to keep the network engaged.
14. Monitor the engagement metrics of the follow-up emails, such as open rates and click-through rates, to assess the effectiveness of the campaign.
15. Review the results of the follow-up email campaign and analyze its impact on your client's network. Use this feedback to improve future communication strategies.

Task | Sending "What to Expect" Booklet to Recent Home Buyers

Description of the Task: This task entails the thoughtful delivery of a "What to Expect" booklet to individuals who have recently purchased homes. The aim is to offer these new homeowners a comprehensive resource that helps them navigate the initial stages of homeownership with ease. The goal is to foster a positive experience during this significant life transition.

1. Ensure that the "What to Expect" booklet is in excellent condition, containing all relevant information for new homeowners.
2. Choose a thoughtful closing gift, such as a Custom Box Opener, and make it ready for presentation.
3. Create a reminder or trigger for asking the client to leave a Google review once they receive their closing gift.
4. Log in to Reminder Media, your client management platform, to manage client records.
5. Find the client's profile within Reminder Media or create a new one if they're not in the system.
6. Change the client's status to "Past Client" to ensure they receive appropriate follow-ups.
7. Log in to your HubSpot CRM, a customer relationship management system.
8. Go to the "Contacts" section in HubSpot to manage client records.
9. Locate the client's existing record or create a new one if it doesn't exist.
10. Ensure all client information is accurate, including their new address.
11. Designate the Graduation date as the Close date in HubSpot for the client's property purchase.
12. Log in to HomeBot, a homeownership updates platform.
13. Include the client's email address in HomeBot to provide them with ongoing updates and insights related to their new home.
14. Access the Handwritten follow-up system, a tool for personalized communication.
15. Locate the client's profile within Handwritten or create a new one.
16. Set up automated birthday greetings using the client's birthdate.
17. Establish automated anniversary greetings using the client's wedding or move-in anniversary date.



TRAINING

Task | Assisting with Residential Real Estate Training

Description of the Task: This task involves providing valuable assistance and support for residential real estate training programs. The goal is to contribute to the success of these training initiatives by aiding in various aspects such as curriculum preparation, participant coordination, and ensuring a seamless learning experience.

1. Determine the specific training needs of the participants, such as first-time homebuyers, real estate agents, or property investors.
2. Create training materials, presentations, guides, and resources covering essential topics in residential real estate, such as market trends, property valuation, negotiations, legal aspects, and financing options.
3. Organize the training content into a structured curriculum, sequencing topics logically and progressively.
4. Choose suitable platforms for delivering the training, such as webinars, video conferencing, e-learning platforms, or in-person workshops.
5. Plan training sessions, considering time zones and participants' availability.
 - a. Set up registration processes, send invites, and provide login or access instructions.
6. Assist the training team in conducting engaging and informative training sessions, using the developed materials.
 - a. Encourage participation, answer questions, and facilitate discussions.
7. Include real-life case studies, examples, and scenarios to illustrate key concepts and make the training more relatable.
8. Incorporate interactive elements such as quizzes, group exercises, and role-play scenarios to enhance learning.
9. Allocate time for Q&A sessions to address participants' inquiries.
 - a. Gather feedback after each session to continuously improve the training experience.
10. Provide a certificate of completion for participants who successfully complete the training.
11. Assess the effectiveness of the training through surveys, participant performance, and outcomes.
 - a. Continuously refine the training based on feedback and evolving industry trends.