**SOP – Duties of Agents/Admins** Logo, company name

Description automatically generated

**Lead Agent:**

* Cash Checks
* Lead Generation
* Listing Appointments
* Team Presentations
* Calls, Notes & Pop-Bys
* Negotiations
* Home Inspections - Pop in for debrief when can
* COE Signings & Keys when able
* Manage Agents & Clients
* Oversee Transactions and Operations
* Marketing Plans
* Internet Management
* Farming Management

**Working Agent:**

* Contact leads immediately - let someone know if can’t
* Keep Team Lead updated and in touch with clients too – through database program
* Listing Appointments
* Calls, Notes & Pop-Bys
* Keysafes & SignUp (Remind Admin)
* Search & show properties
* Earnest Money to Escrow
* Negotiations
* Set Up Inspections
* Submit Repair Needs to Admin to setup
* Maintain and turn in initial paperwork to Admin Agents
* Office Tours
* Open Houses when necessary
* Stay in Touch Weekly with all Clients
* Review Settlement Statements
* COE Signings & Keys
* Anniversary Videos/Cards

**Admin:**

* Answer Phone – Screen Calls & Follow-up
* Initial Lead Contact/Follow-up (Distribute & Track)
* Order & Prepare Buyer/Seller Books
* Listing Preparation
* Order & Complete Listing/Sale Homework
* Turn In Listing/Sales
* Order Home Book - add sign in pages
* Connect Keysafes & Order Signs Up/Down
* Packet Preparation - Inspections, Walkthroughs & Signings
* News Paper Ads (TNI), MLS & Longnet
* Showing Feedback
* Assist in Preparing Contracts (as needed)
* Open Escrow (as needed)
* Repair Bids - Scheduling & Monitoring
* AdminSystems – Update/Monitor Deadlines
* Skyslope - Uploads/Maintenance (Daily)
* Transaction Management/Checklist (Daily)
* E-Mail Management
* Electronic Filing & Records Backup
* Resize & Save Photos in Dropbox
* Update Trulia, Zillow & Realtor.com
* Manage Calendar
* Payroll
* End of Year Settlement Statements