



Job Title: General Virtual Assistant and Inside Sales Agent **Reporting to: Client and BBVA Account Manager**

The General Virtual Assistant/Inside Sales Agent is an individual who thrives on effective communication and collaboration. They are proactive and derive satisfaction from assisting others. With a dedication to quality and a strong sense of responsibility, they ensure tasks are completed efficiently and accurately. They embody the characteristics of a high achiever, prioritizing teamwork, integrity, and finding mutually beneficial solutions. Adaptable to evolving needs and challenges, they excel in problem-solving and strive for continuous improvement. As the linchpin of our operations, they manage tasks with precision and professionalism, ensuring the smooth functioning of our team.

Expectations:

- Successfully prioritize and manage tasks to ensure timely completion of administrative duties, sales support tasks, and any other responsibilities assigned.
- Effective Communication: Maintain clear and prompt communication with team members, clients, and external stakeholders via email, phone, and other communication channels as needed.
- Proactive Sales Support: Provide proactive support to the sales team by conducting research, generating leads, scheduling appointments, and assisting with follow-up activities to drive sales success.
- Organized Documentation: Maintain accurate and up-to-date records of sales transactions, customer interactions, and administrative tasks using appropriate software or tools, ensuring data integrity and accessibility.
- Continuous Learning and Adaptation: Stay informed about industry trends, company products, and sales strategies, and be willing to adapt to changes in processes or tools to enhance efficiency and effectiveness in the role.

☎ 215-346-6211

✉ admin@beyondbizva.com

📍 Pennsylvania, USA



BEYOND BUSINESS
VIRTUAL ASSISTANTS

50 General Tasks/Duties:

1. Make daily outbound calls to leads, referrals, and prospects.
2. Respond to inbound calls and inquiries promptly.
3. Follow up with leads through phone calls, emails, and text messages.
4. Update and manage the CRM system with accurate lead and client information.
5. Qualify leads and identify their needs and preferences.
6. Build rapport and trust with leads and clients.
7. Schedule appointments and meetings for the Outside Sales Agents.
8. Attend daily and weekly meetings.
9. Collaborate with team members to ensure a seamless customer experience.
10. Provide excellent customer service to clients and prospects.
11. Conduct market research and stay informed about industry trends.
12. Coordinate and attend open houses and other real estate events.
13. Develop and maintain relationships with clients and prospects.
14. Monitor and track daily, weekly, and monthly call metrics and conversion rates.
15. Continuously improve sales techniques, scripts, and strategies.
16. Share insights, ideas, and best practices with the team.
17. Attend networking events and build relationships with potential referral partners.
18. Participate in ongoing training and professional development opportunities.
19. Provide feedback and suggestions for improvement to the sales team and leadership.
20. Assist with coordinating property showings and client meetings.
21. Prepare and present sales proposals to clients and prospects.
22. Document client interactions and update their records in the CRM.
23. Handle objections and address client concerns professionally.
24. Monitor and report on key performance indicators (KPIs) to management.
25. Conduct lead generation activities, such as email campaigns and social media outreach.

☎ 215-346-6211

✉ admin@beyondbizva.com

📍 Pennsylvania, USA



BEYOND BUSINESS
VIRTUAL ASSISTANTS

26. Collaborate with the marketing team to create targeted sales materials.
27. Follow up on past clients and request referrals.
28. Stay updated on the company's product and service offerings.
29. Learn and apply outside sales agent skills for face-to-face meetings with clients and prospects.
30. Assist in the negotiation and closing of sales deals.
31. Maintain a positive attitude and high level of motivation.
32. Develop a deep understanding of the local real estate market.
33. Maintain knowledge of current real estate laws, regulations, and best practices.
34. Implement time management and organization strategies.
35. Support the team in achieving sales targets and goals.
36. Perform administrative tasks, such as data entry and record-keeping.
37. Communicate effectively with team members and clients through various channels.
38. Provide regular updates on lead status and progress to the team and management.
39. Develop and maintain a professional online presence on social media platforms.
40. Handle inquiries and requests from clients and prospects.
41. Research and identify potential new lead sources and opportunities.
42. Maintain relationships with industry professionals: mortgage brokers and home inspectors.
43. Assist in creating and implementing sales and marketing strategies.
44. Develop a deep understanding of competitors and their offerings.
45. Participate in role-play exercises to improve sales skills.
46. Maintain a professional image and represent the company positively.
47. Stay informed about new technologies and tools relevant to the real estate industry.
48. Collaborate with the team on special projects and initiatives.
49. Manage multiple tasks and priorities effectively.
50. Demonstrate a strong work ethic and commitment to success.

☎ 215-346-6211

✉ admin@beyondbizva.com

📍 Pennsylvania, USA



BEYOND BUSINESS

VIRTUAL ASSISTANTS

Deliverables:

- Generate comprehensive sales reports on a regular basis, detailing key performance indicators, sales metrics, and insights to track progress and inform strategic decision-making.
- Administrative Support Documentation: Prepare and organize administrative documents such as meeting agendas, minutes, presentations, and expense reports to facilitate smooth operations and effective communication within the team.
- Lead Generation: Deliver a consistent flow of qualified leads through research, prospecting, and outreach efforts, contributing to the growth and expansion of the sales pipeline.
- Customer Relationship Management: Maintain accurate and updated records of customer interactions, including inquiries, complaints, and feedback, to foster positive relationships and provide personalized support throughout the sales process.
- Marketing Collateral: Develop engaging marketing collateral such as brochures, presentations, and email campaigns to support sales initiatives and enhance brand visibility across various channels

Communications/Interactions with BBVA and the Client:

- VA Manager (VA Admin Lead)- daily
- VA Team – daily
- Lead Agent/Loan Officer –weekly or as needed
- Agent Team/Loan Officer’s Team –weekly or as needed
- Buyers/Sellers/Vendors – none

☎ 215-346-6211

✉ admin@beyondbizva.com

📍 Pennsylvania, USA



BEYOND BUSINESS
VIRTUAL ASSISTANTS

Knowledge/Skills:

- Google Workspace
- Google Suite
- Microsoft Office
- Project Management Softwares: Asana, ClickUp, Monday.com, etc...
- CRMs: Sierra, Go High Level, Follow-up Boss, Sales Force, Hubspot, Mojo, Boomtown, etc...
- Slack, Whatsapp, Zoom and other IM apps
- Email and Calendar Management
- Strong written and verbal communication skills
- Good organizational skills
- Knowledge based
- Conflict Resolution

☎ 215-346-6211

✉ admin@beyondbizva.com

📍 Pennsylvania, USA