

Smart Delegation: Hiring Virtual Assistants & Leveraging AI to Run Your Business

A Practical Guide for Housing Providers
& Real Estate Investors



A little about me

- Licensed Realtor 25+ yrs
- Specialize in Residential, Investment and commercial sales
- Rental Housing Provider
- AI Integrator, assisting business owners
- Published Author 2024 - *Leveraging Virtual Assistants for Cost-Effective Growth*

Who is already using a virtual assistant?

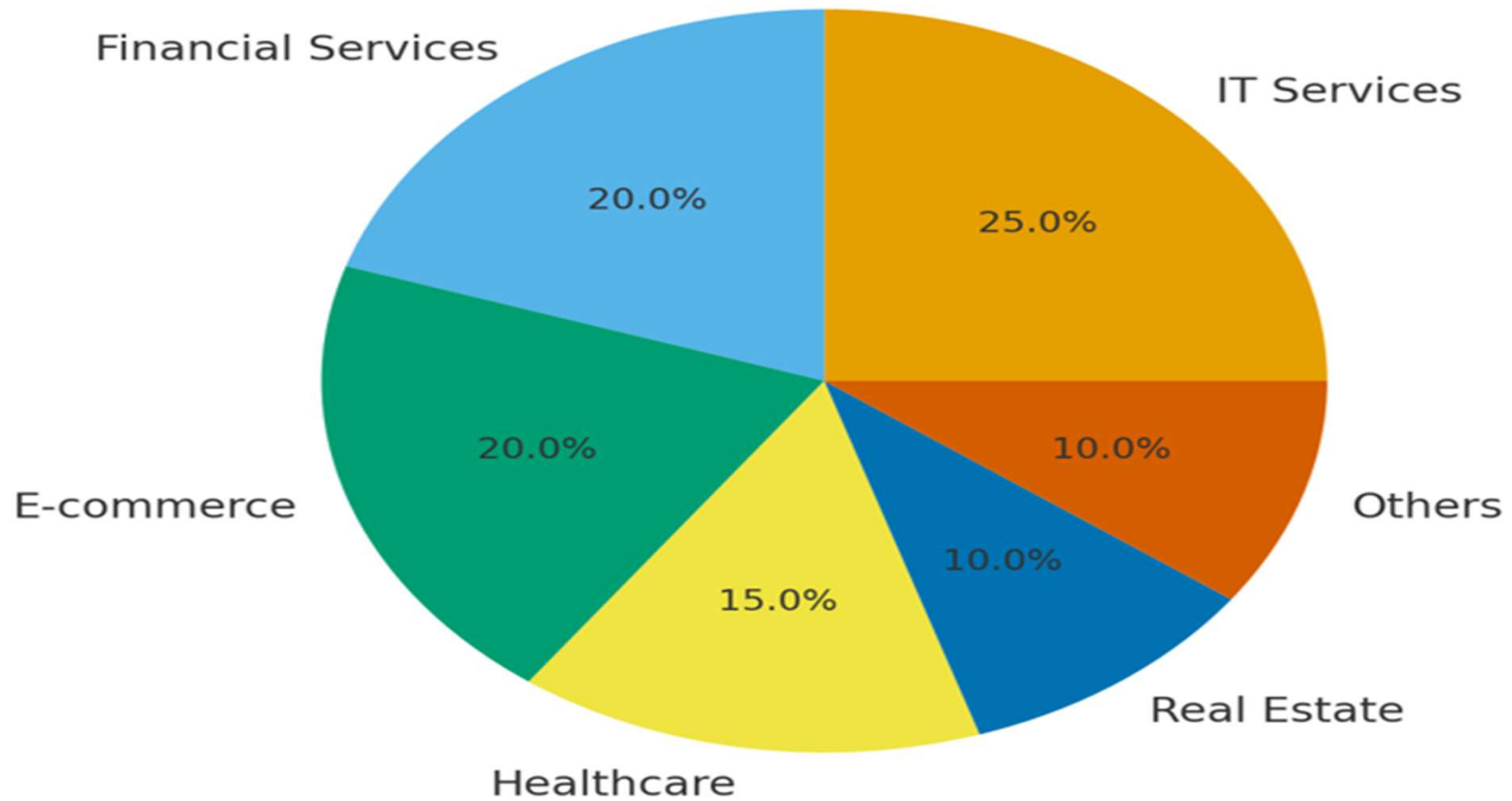
Who is considering hiring a virtual assistant ?

**What are some of the things holding you
back from hiring an assistant?**

**What are some of the task you want to assign
to a virtual assistant?**

Let's unpack what we will cover

Usage of Virtual Assistants by Business Type (2025)



- **What a virtual assistant is**
- **When is it time to hire a virtual assistant**
- **Various task a virtual assistant can handle**
- **How to get started with hiring a virtual assistant**
- **Tools and Managing your virtual assistant**
- **Chat-gpt settings & AI Agents**

What Exactly Is a Virtual Assistant?

- 👉 Virtual – Works remotely, not local in your area
- 👉 Remote Assistants – works outside your office, local or often in the same region

Note: On-Site Assistants



When is it time to hire a VA?

- ✎ Not able to follow up properly
- ✎ There are task you don't want to do
- ✎ If you work a full-time job
- ✎ Many business opportunities missed because of chaos
- ✎ Relieve stress
- ✎ Free up time and simplify your life

What experiences have you had with working with a virtual assistant?

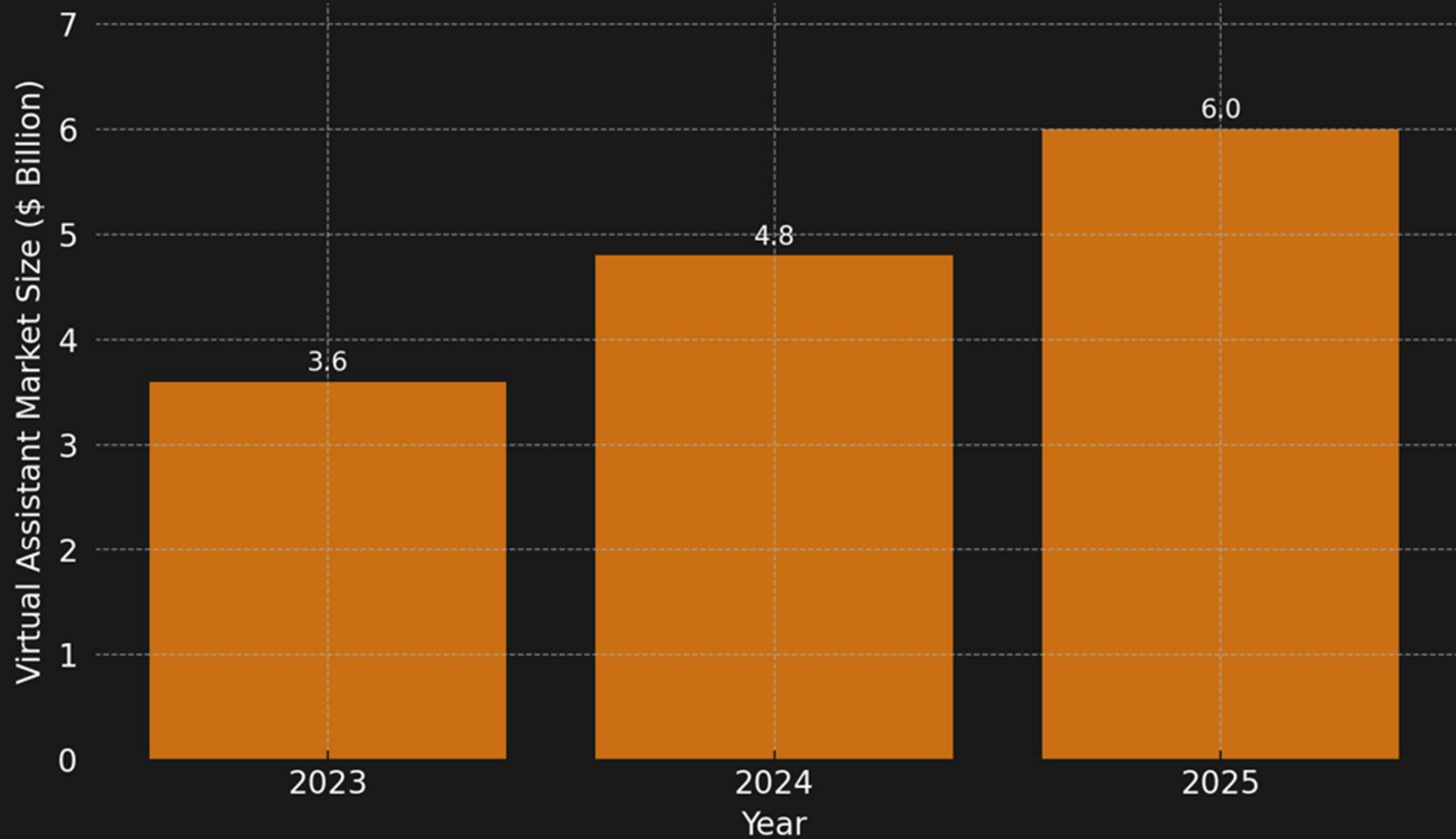
GOOD

- ✚ Saves time
- ✚ Reduces costs
- ✚ Utilizes other staff better
- ✚ Increased efficiency
- ✚ No taxes
- ✚ Area of work is more focused

BAD

- ✚ Communication problems
- ✚ Differences (like cultural, religious, philosophical and more)
- ✚ Personal supervision not possible
- ✚ Data security risks
- ✚ Not enough work

Growth of Virtual Assistant Market



The Leaky Bucket

Every real estate business has a “bucket.”
The bucket represents your vacancies, missed calls, missed opportunities.

The problem?

Most investors and small business owners don't realize their bucket is *leaking* in multiple places.



The Real Cost of Going Solo

40%
Time Lost

\$3K
Monthly
Opportunity
Cost

70
Work Hours
Weekly

The "leaky bucket" problem: You're working harder but revenue isn't growing. Why? Because admin work prevents you from doing income-generating activities.



When It's Time to Hire Your First VA

1

You're Missing Leads

Calls go to voicemail, emails sit unread for days, interested tenants move on to competitors who respond faster.

2

Admin Work Dominates Your Week

You spend more time on paperwork, scheduling, and data entry than on property tours, negotiations, or networking.

3

Growth Has Stalled

You want to acquire more properties but can't handle additional tenants or units with your current bandwidth.

4

You're Burned Out

Weekends and evenings are consumed by tenant issues. You're always "on call" and it's affecting your health or relationships.

The Tipping Point: If you manage 5+ units or spend 20+ hours/week on tasks someone else could do for \$5-15/hour, it's time.!

Types of VAs for Real Estate



Administrative VAs

Email management, calendar scheduling, data entry, document organization



Real Estate Specialists

Lead qualification, tenant screening, lease processing, property research



Maintenance Coordinators

Work order management, contractor scheduling, vendor communication



Marketing VAs

Social media, listing creation, graphic design, content writing



Bookkeeping Support

Expense tracking, invoice processing, QuickBooks updates, rent collection follow-up

Tasks VAs Can Handle

These are real, revenue-protecting activities
your VA can own from day one:

Marketing & Lead Generation

Tenant-Facing

- Post Vacancies
- Tenant Calls
- Maintenance
- Create flyers
- Collect Rent

Investor-Facing

- Marketing
- Qualify deals
- Maintain CRM
- Mailings
- Cold Calls



Tenant Support & Communication



Inquiry Handling

Answer calls, texts, and emails from prospective tenants using your templates and scripts



Screening Apps

Collect applications, run background checks, verify employment and references



Lease Processing

Prepare lease documents, coordinate signings, collect deposits and first month's rent

A responsive VA can turn more inquiries into signed leases — often within 24-48 hours instead of a week.

Maintenance & Vendor Coordination



VA Tasks

1. Receive maintenance requests from tenants via email, text, or portal
2. Triage by urgency (emergency vs. routine)
3. Contact your approved vendors and schedule repairs
4. Follow up to ensure work is completed
5. Process invoices and update maintenance logs

Bookkeeping & Financial Admin

Expense Tracking

Enter receipts, categorize expenses, reconcile credit card statements in QuickBooks or Excel

Rent Collection

Send reminders, log payments, follow up on late rent, coordinate with property managers

Invoice Processing

Review vendor invoices, flag discrepancies, prepare for payment approval

Reporting

Generate monthly P&L summaries, track occupancy rates, compile tax-ready documents

Note: VAs handle data entry and organization.
Your CPA or bookkeeper still handles taxes and complex accounting.

Additional Tasks Virtual Assistant can do *for* You.

TECH-

- ✦ Formatting blog posts
- ✦ Updating websites and plugins
- ✦ Website security and backups
- ✦ Website SEO
- ✦ Video editing
- ✦ Podcast editing
- ✦ Webinar setup
- ✦ Analytics reporting (Google Analytics, email, social media, etc.)
- ✦ Setting up goals in Google Analytics
- ✦ Setting up UTM goals to track website traffic
- ✦ Setting up or migrating email lists to a new email service provider
- ✦ Setting up newsletter opt-in forms and sequences
- ✦ Setting up secure websites (https)
- ✦ Database creation and management
- ✦ Shopping cart installation/maintenance
- ✦ Podcast submission
- ✦ Web design/maintenance
- ✦ Creating surveys and online forms
- ✦ Troubleshooting, IT support
- ✦ Creating and managing affiliate programs
- ✦ Creating landing pages and squeeze pages
- ✦ Streamlining and automating systems
- ✦ Creating digital magazines
- ✦ File conversion
- ✦ Setting up spreadsheets
- ✦ Tracking and fixing broken links
- ✦ Ecourse creation
- ✦ Setting up membership sites
- ✦ Website coding
- ✦ Ad management
- ✦ Setting up digital product delivery
- ✦ Formatting ebooks
- ✦ Creating online quizzes
- ✦ Managing eCommerce sites
- ✦ Managing customer databases
- ✦ Creating and self-publishing books for authors

Admin/Management

- ✦ Customer service through email, chat, or phone
- ✦ Monitoring and responding to emails
- ✦ Organizing email inboxes
- ✦ Managing blog comments
- ✦ Managing social media comments
- ✦ Live webinar assistance
- ✦ Calendar maintenance
- ✦ Data entry
- ✦ Creating PowerPoint presentations
- ✦ Appointment setting
- ✦ Order fulfillment
- ✦ Ordering supplies
- ✦ Ordering, packaging, and sending gifts to clients
- ✦ Sending Thank You's
- ✦ Writing job listings
- ✦ Arranging interviews
- ✦ Answering phone calls
- ✦ Re-purposing content (Example: turn a video into a written blog post or a blog post into a social media post)
- ✦ Taking meeting minutes
- ✦ Managing blog editorial calendars
- ✦ Client onboarding tasks like responding to emails and sending invoices and contracts
- ✦ Following up with leads/clients
- ✦ Guest post-screening
- ✦ Making travel arrangements
- ✦ Form preparation
- ✦ Packaging and shipping products and gifts
- ✦ Creating resumes
- ✦ Monitoring YouTube content
- ✦ Uploading YouTube videos
- ✦ Managing online communities
- ✦ Assisting with teleseminars
- ✦ Creating and updating SOPs
- ✦ Updating house or land listings for realtors
- ✦ Helping launch ebooks or programs
- ✦ Optimizing blog posts with images, linking to other blog posts, and adding CTAs (Call to Actions)

Admin/Management & Creative Writing

- ✦ Project management
- ✦ Event planning and management
- ✦ Giveaway management
- ✦ Organizing cloud files
- ✦ Organizing G-Drive files
- ✦ Hiring and training new team members
- ✦ Personal shopping
- ✦ Translation
- ✦ Brainstorming ideas for blog posts, products, etc.
- ✦ Business strategy
- ✦ Writing blog posts
- ✦ Writing ebooks, books, newsletters, email funnels, etc.
- ✦ Writing or editing audio or video transcriptions
- ✦ Writing social media posts for Facebook, Twitter, or Instagram
- ✦ Editing & proofreading blog posts, books, websites, newsletters, recipes, etc.
- ✦ Email marketing
- ✦ Website and sales page copywriting
- ✦ Ghostwriting
- ✦ Creating product descriptions for online shops like Shopify or Etsy
- ✦ Grant proposals
- ✦ Collecting/editing testimonials
- ✦ Letter writing
- ✦ Podcast scripting

Graphic Design & Social Media

- ♥ Creating graphics for blog posts
- ♥ Photo editing
- ♥ Creating slides for webinars or workshops
- ♥ Designing business cards, flyers, logos, menus, signage, etc.
- ♥ Sourcing photos for blog posts, books, social media, etc.
- ♥ Creating social media graphics or pins
- ♥ Photography for websites and promotional materials
- ♥ Branding services
- ♥ Creating brand style guides
- ♥ Designing ebooks
- ♥ Designing printables for people to sell or promote their businesses
- ♥ Product design for on-demand shipping
- ♥ Scheduling social media updates
- ♥ Designing social media graphics
- ♥ Creating and managing Pinterest accounts
- ♥ Creating and managing Promoted Pins
- ♥ Scheduling pins via Tailwind
- ♥ Creating and managing Facebook accounts
- ♥ Creating Facebook ads
- ♥ Managing Facebook groups
- ♥ Setting up and managing LinkedIn accounts
- ♥ Setting up and managing LinkedIn groups
- ♥ Creating social media polls
- ♥ Creating and managing Instagram posts
- ♥ Responding to social media messages
- ♥ Scheduling messages in ManyChat

Research

- ✦ Researching speaking opportunities
- ✦ Researching guest post opportunities
- ✦ Researching and applying to affiliate marketing programs
- ✦ Researching programs and resources
- ✦ Travel research
- ✦ Event research
- ✦ Keyword research for Etsy, Pinterest, Google, etc.
- ✦ Vendor/printer research
- ✦ Joint venture research and follow up
- ✦ Product research
- ✦ Market research
- ✦ Software and program research
- ✦ Researching and condensing information
- ✦ Hashtag research
- ✦ Sponsorship research
- ✦ Researching and summarizing industry news
- ✦ Education research
- ✦ Researching LinkedIn groups
- ✦ Product price comparison
- ✦ Licensing research
- ✦ Patent research
- ✦ Researching publishers
- ✦ Running promotions
- ✦ Competition research
- ✦ Creating SWOT analysis
- ✦ Researching podcast guests
- ✦ Software research
- ✦ Solution research

Bookkeeping & Marketing

- ✔ Bookkeeping
- ✔ Managing payments and invoicing
- ✔ Processing orders and refunds
- ✔ Making collections calls
- ✔ Handling payroll
- ✔ Billing and invoices
- ✔ Pitching brands
- ✔ Setting up sales funnels
- ✔ Lead generation
- ✔ Creating press releases
- ✔ Marketing strategy
- ✔ Blog post promotion
- ✔ Ebook, course, and membership promotion
- ✔ Ad management
- ✔ Promoting live events
- ✔ Product launches

Take Inventory and categorize tasks

- List everything you do daily in your business
- List everything you hate doing
- List everything you should be doing
- List everything you want to start doing

Where to find virtual assistants



Where to Find Your Perfect VA

- Referrals from Business Owners
- OnlineJobs.ph
- Agencies / VA Staffing Companies
- LinkedIn
- Facebook Groups for Virtual Assistants
- Indeed or ZipRecruiter
- Fiverr
- Virtual Assistant Platforms
- Online Job Boards
- Remote Work Job Boards
- We Work Remotely
- Remote.co
- FlexJobs

The Screening Process That Works

Step 1: Post a Clear Job

Be specific about tasks, hours, tools, and pay rate. Include a "secret word" instruction to test attention to detail.

1

Step 3: Video Interview

Use Zoom to assess communication skills, internet quality, and personality fit. Ask about their workspace and availability.

3

Step 5: Trial Period

Start with a 2-week paid trial. Clear expectations, frequent check-ins, and a go/no-go decision at the end.

5

2

Step 2: Filter Applications

Discard anyone who didn't follow instructions. Look for strong English, relevant experience, and genuine interest.

4

Step 4: Paid Test Task

Assign a real task (e.g., create a property listing) and pay for their time. This reveals work quality and speed.

Red Flags vs. Green Flags

Red Flags

- Vague responses or copy-paste applications
- No examples of previous work
- Poor internet connection during interview
- Unwilling to do a test task
- Overpromises ("I can do everything!")

Green Flags

- Asks thoughtful questions about your business
- Shows portfolio or work samples
- Professional communication and punctuality
- Enthusiastic about learning your systems
- Has reliable tech setup (computer, internet, backup power)

 **Pro Tip:** *The best VAs often have multiple offers. Move quickly once you find a great candidate – top talent gets snatched up fast.*



How to Train Your VA for Success

01

Start with SOPs (Standard Operating Procedures)

Document every repeating task step-by-step. Use tools like Google Docs or Notion. Include screenshots and examples.

02

Record Loom Videos

Screen-record yourself doing the task while explaining your thought process. VAs can rewatch these anytime.

03

Shadow Sessions

Let your VA observe you on calls or tasks. Then have them do it while you watch. Provide real-time feedback.

04

Daily/Weekly Check-Ins

Schedule 30-minute calls to review completed work, answer questions, and prioritize the week ahead.

My Favorite Tools for Managing VAs



Trello or Asana

Visual project boards for task management. Your VA can see what's due, update progress, and flag blockers.



Loom

Record training videos in minutes. No editing needed. Perfect for explaining complex processes visually.



Slack

Real-time communication without email clutter. Create channels for different properties or task types.



Canva

Easy graphic design for property flyers, social media posts, and marketing materials. No design degree needed.



REI Blackbook

Real estate CRM built for investors. Track leads, properties, and tasks in one place. VA-friendly interface.



Time Doctor or Hubstaff

Optional time tracking with screenshots. Builds trust and helps you understand where hours are spent.

My Favorite Tools for Managing VAs



RingCentral

Cloud-based phone system for call routing, voicemail, texting, and video meetings. Your VA can answer calls, forward them to you, or manage support lines from anywhere.



Voxer

Walkie-talkie style voice messaging app. Perfect for quick communication with your VA or team without long phone calls or emails. Fast, simple, and mobile-friendly.



Podio

Customizable project & workflow management. Great for investors who want automated tasks, deal tracking, lead management, and shared workspaces for VAs and team members.



PhoneSpeak

Phone system with voicemail, separate lines, Call Routing and recording

Common Mistakes to Avoid

Hiring Too Fast

Don't skip the screening and test task. A bad hire costs you time and money to replace. Be thorough upfront.

No Documentation

If you don't write down processes, your VA will constantly interrupt you with questions — defeating the purpose of delegation.

Micro-managing

Trust your VA to make minor decisions within guidelines. Checking every email or task kills efficiency and morale.

Overloading at Start

Start with 2-3 tasks and gradually add more. Overwhelming a new VA leads to mistakes and turnover.

No Feedback Loop

Schedule regular check-ins. Address issues early. Recognize wins. Good VAs stay with employers who communicate and appreciate them.

Virtual Admin Interview Questions

Phone Screening Questions are **circled** below

- ✓ Tell me a little about yourself?
- ✓ Do you have any admin experience?
- ✓ Do you understand the job description for which you applied?
- ✓ Why do you think you would be a good fit for this position?
- ✓ This is a part-time position, 15 hours a week does that work for you?
- ✓ What hours are you available to work? Preferable work schedule is 10-3 MW F
- ✓ Can you make calls to the US?
- ✓ Can you text to the US?
- ✓ Do you know anything about social media marketing? Can you do social media postings?
- ✓ Do you have any real estate experience?
- ✓ Do you have any follow up or lead generation experience?
- ✓ How long have you worked as a virtual assistant? Do you currently have other clients/Jobs
- ✓ All jobs have challenges what past task or jobs were challenging or frustrating for you?
- ✓ Do you prefer a set routine everyday of task or do you like to structure your own day?
- ✓ Based on the job description how would your prioritize your day?
- ✓ Based on what we have discussed today what most intrigue you about this position?
- ✓ Is this a position you think could work for you?
- ✓ Do you have any questions for me.

Your Action Plan: Next 30 Days



Week 1: Audit Your Tasks

Track everything you do for one week. Highlight tasks that are repeatable, time-consuming, or low-value for your time.



Week 2: Create Job Description & SOPs

Write a clear job post for your top 3-5 delegatable tasks. Start documenting processes for those tasks with screenshots.



Week 4: Hire & Onboard

Select your VA, set up tools and access, complete training, and start with your first batch of tasks. Schedule a week-end review.



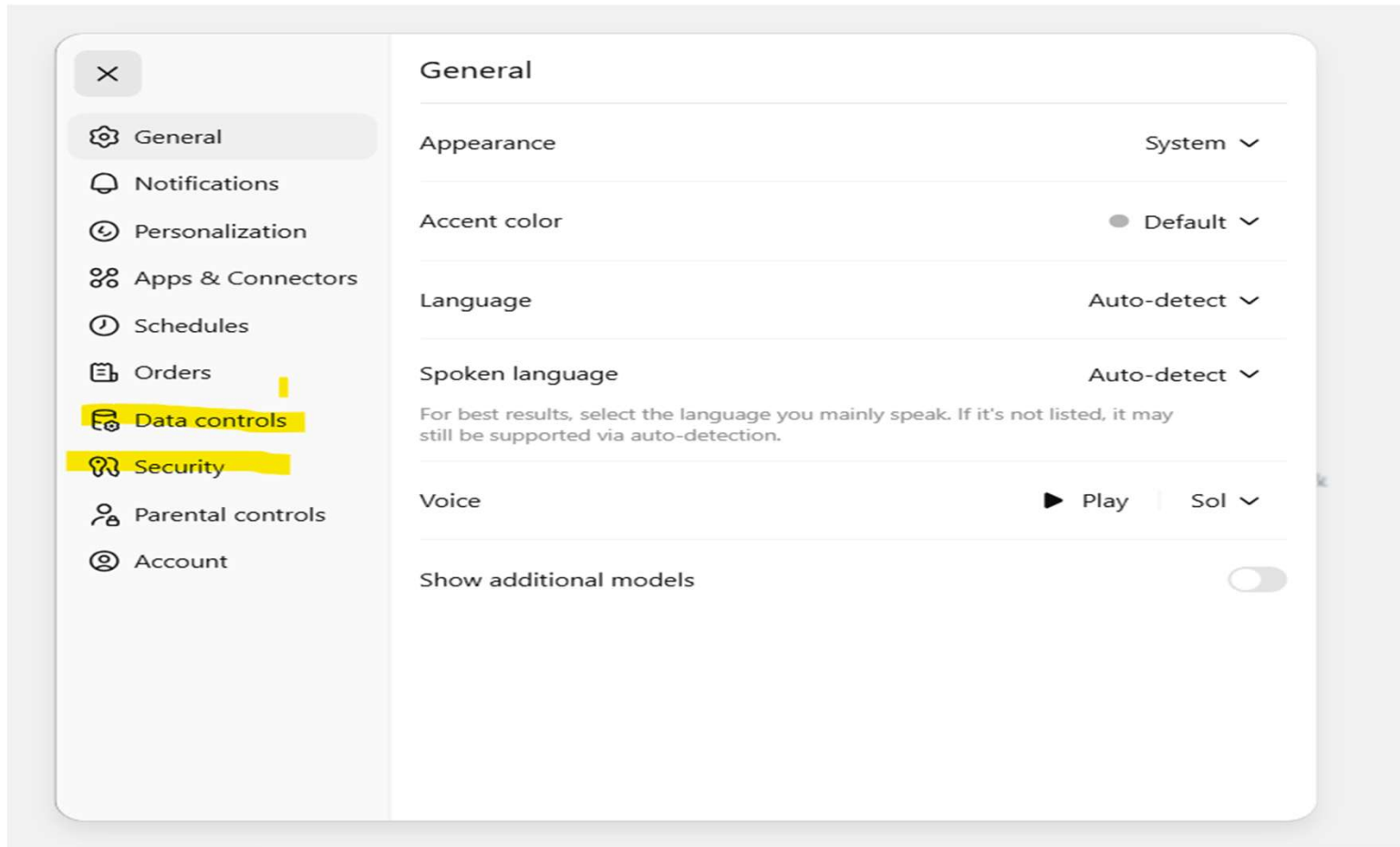
Week 3: Post Job & Screen Candidates

Post on OnlineJobs.ph or Upwork. Review applications, conduct video interviews, and assign a paid test task to finalists.

Goal: Have a trained VA handling at least one task by day 30.

Let's dive into a little AI

Settings, Click on name in bottom right corner





- General
- Notifications
- Personalization
- Apps & Connectors
- Schedules
- Orders
- Data controls
- Security
- Parental controls
- Account

Data controls

Improve the model for everyone

On >

Remote browser data

On >

Shared links

Manage

Archived chats

Manage

Archive all chats

Archive all

Delete all chats

Delete all

Export data

Export



- General
- Notifications
- Personalization
- Apps & Connectors
- Schedules
- Orders
- Data controls
- Security**
- Parental controls
- Account

Security

Multi-factor authentication

Require an extra security challenge when logging in. If you are unable to pass this challenge, you will have the option to recover your account via email.

Trusted Devices

When you sign in on another device, it will be added here and can automatically receive device prompts for signing in.

Log out of this device

Log out

Log out of all devices

Log out of all active sessions across all devices, including your current session. It may take up to 30 minutes for other devices to be logged out.

Log out all

Secure sign in with ChatGPT

Sign in to websites and apps across the internet with the trusted security of ChatGPT. [Learn more](#)

You haven't used ChatGPT to sign into any websites or apps yet. Once you do, they'll show up here.

Chat GPT - Hallucinations

- Fact Check
- Ask for proof
- Prove what your saying

AI Tools – Quick Guide

- Video In -> Text Out = Descript
- Text In -> Voice Out = Eleven Labs
- Text In -> Video Out = RunWay
- Text In -> Action = Make.com or Zapier



LEVERAGING VIRTUAL ASSISTANTS *for* COST-EFFECTIVE GROWTH

How to Scale Your Business Without Breaking the Bank



Tancy A. Mason-Phillips

LEVERAGING VIRTUAL ASSISTANTS *for* COST-EFFECTIVE GROWTH

By
Tancy A. Mason-Phillips

AVAILABLE ON AMAZON

Leveraging Virtual Assistance for Cost Effective Growth: How to scale your Business without Breaking the Bank

- SEVERAL CASE STUDIES
 - SHARED HOUSING
 - HOME STAGING
 - SCHEDULER
 - PROPERTY MANAGEMENT
 - FLOOR PLANS
 - WHOLESALING
- VARIOUS TASK ADMINS CAN DO
- DAILY SCHEDULE
- MILESTONE TASKS
- MONITORING
- TRAINING
- ESSENTIAL TOOLS
- PERSONALITY TESTING
- DELEGATING TASKS
- CREATING SOP's
- EACH CHAPTER HAS REVIEW & ACTION ITEMS
- **BONUS CHAPTER** – HOW TO GET STARTED IN REAL ESTATE WITH NO MONEY



Tancy Mason Phillips

Direct Dial: 614-226-1014

Email: tancy@tancymason.com

Website: www.tancymason.com



Questions?

Stay Connected

Tancy A. Mason-Phillips  Email: tancy@tancymason.com
Website: tancymason.com
614-226-1014

Thank you