RE PROS ACADEMY

The Real Estate Operations Starter Kit

25 Checklists, Workflows & AI Prompts Every Modern Real Estate Professional Should Have

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What's Inside

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WELCOME

Why Operations Wins Deals

Every agent gets taught how to find clients. Almost no one gets taught how to run the business once those clients show up. That gap is where deals get dropped, deadlines get missed, and good agents burn out doing $15-an-hour work instead of the $1,000-an-hour work only they can do.

This kit exists because the real estate professionals who last aren't always the best negotiators or the most charismatic — they're the ones who built systems around themselves early. A documented process doesn't care if you're tired, distracted, or juggling five closings at once. It just runs.

> ***"The agents who scale aren't working harder than everyone else. They're working inside better systems."***

Whether you're an agent trying to get your time back, a new hire trying to understand how the pieces fit together, or a team lead deciding who to bring on next — this kit gives you a real, usable starting point. Not theory. Not fluff. The actual workflows, checklists, and prompts we use inside RE Pros Academy, simplified.

Use it. Steal it. Put your name on it if you want. And when you're ready to go deeper, the full library is one click away.

SECTION 1

The Real Estate Transaction Workflow

A visual, contract-to-close roadmap. Whether you're an agent, a coordinator, or brand-new to the industry, this is the map everything else in this kit hangs on. Every checklist, every hire, every prompt later in this guide maps back to one of these stages.

Timing	Milestone	Primary Owner
Day 0	Contract executed — file opened, sent to title/escrow	TC / Admin
Day 1–3	Earnest money deposited & confirmed	TC
Day 3–5	Inspection ordered & scheduled	Buyer's Agent / TC
Day 5–10	Inspection period — negotiate repairs/credits	Agent
Day 7–14	Appraisal ordered	Lender
Day 10–20	Loan processing & underwriting	Lender
Day 15–21	Title search & commitment issued	Title Company
Day 21–25	Clear to close	Lender
Day 25–28	Final walkthrough	Buyer / Agent
Day 28–30	Closing — documents signed, funds disbursed	All Parties

Timelines vary by contract, financing type, and local market — use this as a starting template, not a fixed rulebook.

Where Deals Actually Fall Apart

Most agents assume deals die in negotiation. In practice, more deals stall in the quiet, unglamorous middle — between inspection and clear-to-close — where nobody is proactively chasing the next step.

Stage	What Usually Goes Wrong	How to Prevent It
Inspection	Repair requests sent late or missing deadlines	Calendar the deadline the day the contract is signed
Appraisal	No one follows up if it comes in low	Set a check-in task for the expected appraisal date
Underwriting	Buyer goes quiet on document requests	Weekly proactive check-in with lender, not just buyer
Title	Liens or title issues surface late	Order title search immediately, don't wait
Walkthrough	Scheduled too close to closing to fix issues	Schedule 48+ hours before closing, not the morning of

SECTION 2

Which Role Should You Hire First?

A simple decision tree for agents and teams wondering where to put their next dollar of payroll — followed by a full breakdown of what each role actually does.

Start here: Are you spending 10+ hours a week on admin, paperwork, or follow-up instead of selling?

No — you're not ready to hire yet. Focus on systems and revisit this in 90 days.

Yes — go to the next question.

What's actually breaking?

Deadlines, contracts, and paperwork are slipping through the cracks → Hire a Transaction Coordinator

Listings take too long to launch (photos, MLS input, marketing) → Hire a Listing Coordinator

Your inbox, calendar, and errands are eating your day → Hire an Admin or Virtual Assistant

You lead a team of 5+ agents and systems are breaking at scale → Hire a Director of Operations

Most solo agents outgrow "just an admin" faster than they expect. Most teams wait too long to bring in a Director of Ops. Use this tree annually, not once.

Role Profiles at a Glance

Role	Owns	Hire When...
Admin / VA	Inbox, calendar, errands, data entry	You're missing appointments or drowning in small tasks
Transaction Coordinator	Contract-to-close paperwork & deadlines	Files are slipping through the cracks
Listing Coordinator	MLS input, photos, marketing launch	Listings take days instead of hours to go live
Director of Operations	Systems, hiring, SOPs across the team	You have 5+ agents and things break at scale

Compensation structures vary widely by market and experience — hourly, per-file, salaried, and commission-based models are all common. Research local norms before setting pay.

SECTION 3

Daily, Weekly & Monthly Success Checklists

Daily — Agent Version

Review calendar and top 3 priorities for the day

Follow up with new leads within 5 minutes

Check transaction deadlines on all active files

Call or text 3 people in your sphere/past clients

Preview or research 1–2 new listings

Log all activity and notes in your CRM

Post one piece of content or engage on social media

Block 60–90 minutes for lead generation

Review pending offers or negotiations

End-of-day review: what moved, what's stuck

Daily — Support Professional Version

Check overnight emails and flag anything urgent

Review deadlines due today across all files

Update agent/team on any status changes

Confirm today's appointments and showings

Prep documents that need signatures

Update CRM and task tracker

Follow up with title, lender, or vendors for status updates

Prep tomorrow's priority list

File and organize completed compliance documents

Send end-of-day status recap to agent/broker

Weekly Rhythm (Everyone)

Review every active file for stalled next steps

Audit CRM for leads with no follow-up in 7+ days

Plan content/marketing for the coming week

1:1 check-in between agent and support staff

Review pipeline: what's closing this month, what's at risk

Monthly Rhythm (Everyone)

Review closed transactions — what went smoothly, what didn't

Reconcile commissions and expenses

Send market update to sphere and past clients

Revisit and update SOPs based on what broke that month

Set next month's lead generation and revenue goals

SECTION 4

AI Prompt Pack

Copy, paste, and customize. Swap in your details wherever you see brackets. Organized into four groups so you can find the right prompt fast.

LISTINGS & MARKETING

1. Listing Description

> *Write a compelling MLS listing description for a [bedrooms]-bed, [baths]-bath [property type] at [address]. Highlight [key features]. Keep it under 200 words, warm but professional tone, no clichés like "must see."*

2. Social Media Post

> *Write a short, scroll-stopping social media caption about [topic — new listing / market update / closing]. Include a hook in the first line and one clear call to action.*

3. Just Listed / Just Sold Announcement

> *Write a short, exciting "Just Listed" (or "Just Sold") announcement for [address] to send to my email list and post on social media. Include one standout detail about the home or the sale.*

4. Property Video Script

> *Write a 60-second video walkthrough script for [address], highlighting [3 key features]. Casual, conversational tone, with a strong hook in the first 5 seconds.*

5. New Listing Email Blast

> *Write a short email announcing my new listing at [address] to my sphere and past clients, with a clear call to action to schedule a showing or refer a friend.*

CLIENT COMMUNICATION

6. Client Follow-Up

> *Write a short, warm check-in text/email to a past client I haven't spoken to in [timeframe]. Mention [personal detail if known] and ask a genuine question — no sales pitch.*

7. Buyer Welcome Email

> *Write a welcome email for a new buyer client outlining our process together, what to expect in the first two weeks, and how to reach me.*

8. Seller Welcome Email

> *Write a welcome email for a new seller client after signing the listing agreement, outlining next steps (photos, staging, launch date) and how we'll communicate.*

9. Open House Follow-Up

> *Write a follow-up email for everyone who attended my open house at [address], thanking them and inviting questions without being pushy.*

10. Referral Request

> *Write a short, non-awkward message I can send to a recently closed client asking if they know anyone else looking to buy or sell.*

TRANSACTIONS & CONTRACTS

11. Contract Email

> *Write an email to my client explaining that the contract has been fully executed, what happens next in the process, and what they need to do in the next 5 days.*

12. Inspection Response

> *Draft a professional email to the [buyer/seller]'s agent responding to the attached inspection report. We are requesting [repairs/credits]. Tone: firm but collaborative.*

13. Price Reduction Conversation

> *Write talking points for a phone call with a seller about reducing their list price from [price] to [price], backed by [market data]. Empathetic but direct.*

14. Multiple Offer Explanation

> *Write a plain-English email to a buyer explaining that we're in a multiple offer situation, what our options are, and how I recommend we proceed.*

15. Closing Congratulations

> *Write a warm congratulations email to send the day after closing, including next steps (utilities, insurance, mail forwarding) and a request for a review or referral.*

OPERATIONS & PLANNING

16. Weekly Task Planning

> *Based on this list of active files [paste list], help me build a prioritized task plan for the week, grouped by urgency and by client.*

17. Market Update Email

> *Write a brief monthly market update email for my sphere covering [neighborhood/city], including average price trends and days on market, in plain English.*

18. Seller Net Sheet Explainer

> *Explain this seller net sheet [paste numbers] in plain language a first-time seller would understand, without using industry jargon.*

19. SOP Writer

> *Turn this messy description of how I [do a specific task] into a clean, numbered standard operating procedure someone new could follow without asking me questions: [paste description].*

20. Meeting Recap

> *Turn these rough meeting notes into a clean recap email with clear action items, owners, and deadlines: [paste notes].*

SECTION 5

Transaction Checklist (Simplified)

A high-level version of the milestones every file should hit, grouped into the three phases every transaction moves through. This is the abbreviated view — the complete, phase-by-phase Transaction Coordination Checklist, with sub-tasks and document templates for every stage, lives inside RE Pros Academy.

Phase 1 — Contract to Inspection

Contract fully executed and sent to title/escrow

Earnest money deposited and confirmed

File opened in transaction management system

Inspection ordered and scheduled

Phase 2 — Inspection to Clear-to-Close

Inspection negotiations resolved

Appraisal ordered

Loan application and disclosures confirmed with lender

Title search initiated

Clear to close received

Phase 3 — Clear-to-Close to Keys

Title cleared

Homeowner's insurance confirmed

Final walkthrough completed

Closing documents signed

Keys transferred

File closed and archived

SECTION 6

The Real Cost of Running Without Systems

"I'll just remember it" is the most expensive sentence in real estate. Every process that lives only in someone's head is a process that breaks the moment that person is sick, on vacation, or simply juggling too much at once.

What Disorganization Actually Costs You

Deals that close later than they should — or don't close at all — because a deadline got missed

Clients who don't refer you again because the process felt chaotic, even if the outcome was fine

Hours every week spent re-explaining the same process to a new hire because nothing is written down

Burnout — from agents doing coordinator-level work instead of the revenue-generating work only they can do

Compliance risk — missing signatures or disclosures that surface months later

> ***"A missed deadline rarely looks like a big mistake in the moment. It looks like a normal, busy Tuesday."***

None of this is about working harder. It's about the fact that memory doesn't scale, and neither does a business built on it. Systems are what let you take a vacation without your pipeline falling apart — and what let you say yes to more clients without saying yes to more chaos.

SECTION 7

10 Signs You Need Help Right Now

If you recognize three or more of these, it's not a "someday" problem — it's a right now problem.

You've missed or nearly missed a contract deadline in the last 90 days

You're doing data entry or paperwork after 7pm on a regular basis

You can't remember the last time you took a full day off without checking email

New leads sometimes go a full day or more without a response

You don't have a written process for anything — it all lives in your head

Your CRM has leads in it you haven't followed up with in weeks

You've said "I really need to hire someone" more than twice this year

A client has asked "what's the status of..." and you didn't immediately know

You're the bottleneck — nothing moves forward unless you personally touch it

You've thought about leaving the business because it feels unsustainable

None of these are a reflection of your ability as an agent. They're a reflection of a business that has outgrown its systems — which is a good problem, but still a problem.

SECTION 8

Real Estate Operations Health Score

Rate each statement from 0 (not at all) to 10 (fully in place), then add up your total. Be honest — this is a diagnostic, not a test.

We have documented workflows for our repeatable tasks.

We have a real onboarding process for new hires.

We have AI tools integrated into daily operations.

We have written SOPs for our core transaction stages.

Our team uses a CRM consistently — not just sometimes.

Roles and responsibilities are clearly defined and delegated.

Your Score

Score	What It Means	Next Move
0–20	Your business is running on memory.	Start with Section 1 & 5 — document your core workflow first.
21–40	You've built some systems, but there are gaps.	Focus on the gaps — likely onboarding, SOPs, or CRM discipline.
41–60	You're on the path to operational excellence.	Refine and delegate — you're ready to scale what's working.

YOUR NEXT STEP

Build Smarter Systems — Whatever Seat You're In

Whether you're a:

Agent

Transaction Coordinator

Listing Coordinator

Virtual Assistant

Director of Operations

Brokerage

RE Pros Academy was built to help you build smarter systems — with the full checklist library, workflow templates, and training this starter kit only samples.

Explore the complete Academy → **reprosacademy.com**