



*“Make it Easier”* Brainstorm Booklet  
with Lisa Novak



**CONVENIENCE IS THE  
COMPETTIVE ADVANTAGE**

## **First Contact**

- Can clients book directly into your calendar?
- Do you reply within 5-10 minutes?
- Do you send a clear next-step message immediately?
- Is your appraisal request process one-click simple?

## **Listing Presentation**

- Is your proposal short, clear and decision-focused?
- Do vendors know exactly what happens next?
- Can documents be signed digitally on the spot?
- Do you remove jargon and long explanations?

## **Communication**

- Do you set communication expectations upfront?
- Are updates proactive instead of reactive?
- Are messages clear and structured (no rambling)?
- Do clients always know where they stand?

## **Decision-Making**

- Do you give clear recommendations - not just options?
- Do you summarise choices in 3 bullets or less?
- Do you reduce unnecessary meetings?
- Can approvals happen quickly via SMS/email?

## **Vendor Experience**

- Are pre-listing tasks simplified into a checklist?
- Do you coordinate trades and styling to reduce vendor effort?
- Are campaign timelines visual and easy to follow?
- Do you remove admin from their plate wherever possible?

## **Internal Workflow**

- What tasks slow you down daily?
- What could be templated?
- What could be delegated?
- Where are you overcomplicating something simple?

## **Quick Challenge**

*Decide three friction points you'll remove in the next 30 days.*



# ABOUT WINGMAN GROUP

Australia and New Zealand's fastest-growing offshoring provider.

# OFFSHORING GUIDE FOR REAL ESTATE

## TASKS YOUR REMOTE PROFESSIONAL CAN DO

Administration	Marketing	Database Management
Updating Contacts in CRM System (e.g. Vault, Rex, AgentBox).	Using Canva, RealHub, CampaignTrack to Create DLs.	Cleaning Contacts and Properties in Database.
Tracking Buyer and Seller Interaction.	Managing Social Media (Facebook, Instagram, YouTube).	Merging and Cleaning OFI Attendees in Database.
Adding New Property Listings (realestate.com.au, domain.com.au).	Creating Content for Social Media (Just Sold and Just Listed).	Searching OFI Attendees in ID4Me and RP Data to check property ownership.
Monitoring the Sales Funnel and Pipeline.	Sending eDMs and Newsletters (CRM, ActivePipe, MailChimp).	Creating Daily or Weekly Call Lists with RiTA.
Assigning Tasks and Reminders for Agents.	Create Signboards, Brochures, and OFI Packs.	Monitoring and Updating Pipeline in CRM and Excel.
Creating Appraisals or Proposals Based on Template (e.g. Canva, InDesign, Realtair, Engage).	Prepare and Send eBrochures.	Adding New Leads to Pipeline and CRM.
Book Photographer or Videographer.	Send Email to Vendor and Buyer for RateMyAgent/REA review.	Creating Expired or Withdrawn Call Lists.
Book Stylist and/or Trades.	Draft and Send SMS Campaigns to Database.	Monitor Potential Seller Activity on Realtair Proposals and Marketing Materials.
Prepare Weekly Vendor Reports.	Running Just Listed/Just Sold Paid Meta Ads Campaigns.	Creating Expired or Withdrawn Call Lists.
Create and Send Contracts.	Post Just Listed/Just Sold Stories on Instagram.	Tag and Segment Contacts e.g. buyer, seller, investor, landlord.
Load Contracts into CRM (e.g. Vault, Rex, AgentBox).	Responding to Messages and Comments on Social Media.	Assign Follow-Up Reminders and Tasks to the Agent.
Create Property Fact Sheet and WhatsApp Vendor Group.	Creating Weekly Reports on Social Media Ads and Posts.	Set Up Automated Birthday, Post-Sale, Anniversary Messages.
Request Rental Appraisal.	Resize and Watermark Property Photos.	Maintain Privacy Compliance.
Request DBYD, Form 2 Sellers Disclosure, Flood Map etc.		Record Referral Sources e.g. social media, past client, OFI.



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