Google Keep

Google Keep is a simple but powerful tool that allows agents to organize and access their checklists, processes, and notes from anywhere. Whether you're prepping a listing, walking through the buying process with a client, or setting up for an open house, Google Keep provides a fast, visual way to stay organized and on track. Notes can be color-coded, pinned, shared, and accessed on mobile or desktop—making it ideal for agents on the go.

Using Google Keep to Organize Listings, Buyer Processes, and Open Houses

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Purpose

To provide real estate agents with a standardized method for using Google Keep to create, organize, and share checklists that support consistent execution of key business processes.

Scope

This SOP is designed for agents using Google Workspace tools as part of their daily business operations, particularly in listing preparation, buyer client workflows, and open house readiness.

Required Tools

- Google Keep (accessible via web at keep.google.com or through the Google Keep mobile app)
- Google Account
- Optional: Google Calendar (for time-based syncing)

Procedure

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1. Accessing Google Keep

- **Web**: Go to keep.google.com
- **Mobile**: Open the Google Keep app (available for iOS and Android)

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2. Creating a New Note or Checklist

Steps:

1. Click **“Take a note…”** or tap the plus sign (+) in the app.
2. Title the note for clarity (e.g., “Listing Prep – 123 Main St”).
3. For checklists, click the **checkbox icon** to convert the note to a to-do format.
4. Add your tasks, such as:
    - Schedule photography
    - Prepare feature sheet
    - Coordinate staging
    - MLS input and verification
5. Click **Done** or simply back out to auto-save.

Tip: Use standard templates that can be duplicated for each client.

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3. Organizing Notes

Best Practices:

- **Color-code**: Use specific colors for categories (e.g., Yellow = Listings, Blue = Buyers).
- **Pin important notes**: Keep your top priorities or active clients pinned at the top.
- **Use labels**: Create labels like “Listing Checklist,” “Buyer Flow,” “Open House Prep” for easy filtering.

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4. Duplicating a Checklist for a New Client

Steps:

1. Open an existing checklist (e.g., “Open House Setup”).
2. Click the **three-dot menu** in the bottom-right.
3. Select **“Make a copy”**.
4. Rename the copy (e.g., “Open House – 555 Oakridge Dr.”).
5. Edit details as needed for the new property.

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5. Sharing Notes with Admin or Team Members

Steps:

1. Open the checklist.
2. Click the **collaborator icon** (silhouette with + symbol).
3. Enter the email address of your assistant, teammate, or admin.
4. Click “Save” or “Send.”

This enables live collaboration and visibility across the team.

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6. Using Google Keep in the Field

- Use the **mobile app** to check off items in real time during listing appointments, showings, or open houses.
- Add voice notes or quick photo attachments (e.g., staging ideas, signage placement).
- Use the **search bar** to instantly find past notes.

Example of how Keep can look for an agent checklist system

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