Real Estate Agent Onboarding Checklist

Use this onboarding checklist to ensure your new agents have an efficient and successful onboarding experience when joining your brokerage or team.



DOCUMENTS & SET UP

- [ ] Agent employee folder created (paper and digital)
- [ ] Received agents contact information
- [ ] Agent has complete W-9 and other employment documents
- [ ] Received agents current and up to date license(s)
- [ ] Agent provided direct deposit/bank information
- [ ] Agent received welcome packet and training documents/manual
- [ ] Agent has set up social media accounts
- [ ] Agent has joined social communities such as Yelp, Linkedin, Google, Zillow, Realtor.com, etc
- [ ] Business cards have been ordered
- [ ] Name tag has been created and ordered
- [ ] Agent email has been set up
- [ ] Agent desk/office area is set up
- [ ] Professional photos have been taken
- [ ] Agent bio complete
- [ ] Lead generation set up

AGENT TRAINING

- [ ] Agent office/desk/ phone training
- [ ] Company website training (listings, blog, blog set up, etc)
- [ ] MLS training
- [ ] Pricing a home training
- [ ] Listing training
- [ ] Rental listing training
- [ ] Private listing training
- [ ] Set up agent personal website
- [ ] Client showing training (practice scripts)
- [ ] Private showing training
- [ ] Open house training (practice scripts and safety training)
- [ ] Seller disclosure training
- [ ] Selling techiques training
- [ ] The art of negotiation training
- [ ] Contract training
- [ ] Purchase and offer training
- [ ] Closing training
- [ ] Additional education or training courses (licensing)

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