

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 techniques training
- ☐ The art of negotiation training
- ☐ Contract training
- ☐ Purchase and offer training
- ☐ Closing training
- ☐ Additional education or training courses (licensing)

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