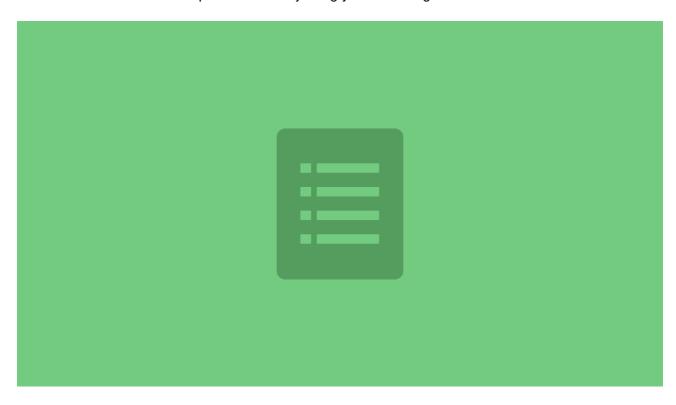
## **Real Estate Agent Onboarding Checklist**

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)	Make and Share Free Checklists checkli.com