

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)