



Agent Onboarding Playbook

45-Step Agent Onboarding Process for
Real Estate Brokerages and Teams

Prepared by
[Agently.com](https://www.agently.com)

Phase 1

Getting acquainted

10 activities | 3 days

Prepared by
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Onboarding: Getting acquainted (3 days)

Activity 1 out of 10

Title:

Welcome message from the CEO

Description:

Watch this short welcome message from our CEO.



Onboarding: Getting acquainted (3 days)

Activity 2 out of 10

Title

What it means to be an agent at [Brokerage Name]

Description

At [Brokerage Name], our goal is to help you build a successful real estate business. It's a business, not a job and *you* are the CEO. Real estate is a business of talking to people.

Our mission is to provide you with all the knowledge, skills and resources you need to succeed, but your success is entirely in your hands.

Real estate is a business of connecting with people, building relationships, and delivering value. At [Brokerage Name], we equip you with the knowledge, skills, and resources needed to thrive and build a sustainable real estate business.



Onboarding: Getting acquainted (3 days)

Activity 3 out of 10

Title

Onboarding process overview

Description

Phase 1

- Administrative tasks
- Goal-setting
- Transferring your license
- Setting up your MLS

Phase 2

- Technology setup & training
- Key skills training, offer writing, negotiations
- Marketing tools & building your online presence



Phase 3

You will then dive into the three pillars of real estate:

1. Lead Generation – Master how to get in front of more people and spark meaningful real estate conversations.
2. Lead Follow-Up – Learn best practices and tools, like CRM, to nurture relationships and build trust with your clients.
3. Lead Conversion – Develop the scripts and strategies needed to guide clients from their first inquiry to a successful closing.

By committing to this 100-day program, you'll be on track to closing your first transaction. Let's get started on building your success!

Onboarding: Getting acquainted (3 days)

Activity 4 out of 10

Title

Our mission, culture & values

Description

- Integrity and Transparency**
 We believe in earning trust through honesty, ethical practices, and clear communication. Our commitment to integrity and transparency ensures that every interaction is built on a foundation of respect and reliability.
- First-Class Client Service**
 Providing exceptional service is at the heart of everything we do. We are dedicated to understanding our clients' needs, exceeding expectations, and delivering personalized solutions that create outstanding experiences.
- Local Expertise and Professionalism**
 With deep knowledge of the local market and a commitment to professional excellence, we empower our agents to deliver expert guidance and insights that drive success for clients and communities alike.



Onboarding: Getting acquainted (3 days)

Activity 5 out of 10

Title

Download the welcome package

Description

We're excited to get you started on your journey with [Brokerage Name]! To help you hit the ground running, we've prepared a comprehensive Welcome Package that includes all the essential tools, resources, and information you'll need. Please take a moment to download it - inside, you'll find details about our systems, key contacts, training schedules, and more. It's your first step toward success with us, so be sure to review it carefully!



Onboarding: Getting acquainted (3 days)

Activity 6 out of 10

Title

Meet the team

Description

At [Brokerage Name], you'll be supported by an exceptional team of leaders and mentors.

- [Team Leader Name], our Managing Broker, brings over [#] years of experience in guiding agents to success
- [Mentor Name] is a top producer and will be your go-to mentor
- [Marketing Director Name] leads our cutting-edge marketing efforts to help you stand out in a competitive market
- [Transaction Coordinator Name] ensures every deal is seamless from contract to close
- If you need any admin support be sure to contact [Admin name]

Together, we're committed to providing the expertise and support you need to thrive!



Onboarding: Getting acquainted (3 days)

Activity 7 out of 10

Title

Knowing who to ask

Description

As you navigate your journey in real estate, remember that you are never alone at [Brokerage Name]. We are here to support you every step of the way. If you need assistance, here's who to turn to:

1. **Agent Support** – Have a compliance, contract, or legal question? Contact [email]
2. **Administrative Staff** – Need help with listings, paperwork, or technical tools like your CRM? Our admin team is here for you [email]
3. **Fellow Agents** – Don't hesitate to lean on your peers. Collaboration is key, and other agents can often share tips and best practices from their own experiences.
4. **Training Resources** – Take advantage of training sessions, online resources, and workshops. These tools are designed to answer your questions and enhance your skills.



Onboarding: Getting acquainted (3 days)

Activity 8 out of 10

Title

Introduce yourself

Description

To start building connections, we invite you to jump into our Team Chat and introduce yourself. It's a great way to say hi, share your background, and get to know your fellow agents.

We also encourage you to meet them in person—whether at the office, during team events, or over a casual coffee.

Our community thrives on collaboration, and forming relationships with your colleagues will help you grow both personally and professionally. Don't hesitate to reach out—we're all here to support one another!



Onboarding: Getting acquainted (3 days)

Activity 9 out of 10

Title

Join the Board and MLS

Description

As a key step in your real estate career, we encourage you to join the local MLS board. This membership will give you access to vital tools, market data, and exclusive listing information that are essential for serving your clients effectively. It's also a great opportunity to network with other professionals and stay updated on industry trends.

Please reach out to [Contact Name] for guidance on the application process and make sure to get involved early—it's an important resource that will set you up for success!



Onboarding: Getting acquainted (3 days)

Activity 10 out of 10

Title

Schedule Realtor Board & MLS Orientation

Description

To ensure you're fully equipped for success, we encourage you to schedule your Realtor board and MLS orientation as soon as possible. This essential step will give you access to critical tools, industry resources, and the latest market data that will help you serve your clients effectively.

The orientation will also familiarize you with best practices and compliance standards within the real estate industry. Please reach out to [Contact Name] to get registered—it's a key part of laying a strong foundation for your career!



Phase 2

Technology Setup

8 activities | 2 days

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Onboarding: Technology Setup (2 days)

Activity 1 out of 8

Title

Request CRM access

Description

A Customer Relationship Management (CRM) system is a vital tool to grow your business and streamline operations. It helps you organize and manage your client interactions, track leads, and automate follow-ups, ensuring that no opportunity slips through the cracks. With a robust CRM like [CRM Name], you can segment your contacts for targeted marketing campaigns, monitor your sales pipeline in real-time, and analyze your performance metrics to make informed decisions.

By nurturing relationships and maintaining consistent communication with clients, a CRM enables you to enhance your service, build trust, and ultimately close more deals. Embracing this technology will not only save you time but also empower you to work smarter, helping you achieve your sales goals more efficiently!

Request your access here [\[Link\]](#)



Onboarding: Technology Setup (2 days)

Activity 2 out of 8

Title

Complete CRM training

Description

To maximize the benefits of our CRM system and enhance your productivity, we invite you to complete the CRM training course. This comprehensive training will equip you with the skills needed to navigate the system effectively, manage your leads, and leverage its features to streamline your workflows. Whether you're new to CRM technology or looking to sharpen your skills, this course is essential for setting yourself up for success. Please check the training schedule and sign up today—you won't want to miss out on the opportunity to unlock the full potential of your CRM!



Onboarding: Technology Setup (2 days)

Activity 3 out of 8

Title

Import your contacts to CRM

Description

Now that you're equipped with the CRM training, it's time to take action! We invite you to import your contacts into the CRM system to get started on building and managing your client relationships effectively.

This is a crucial step in organizing your network and ensuring you can easily track interactions and follow-ups. If you need assistance with the import process or have questions about managing your contacts, feel free to reach out to [Contact Name] for support. Let's get your CRM set up so you can start leveraging its powerful features to grow your business!



Onboarding: Technology Setup (2 days)

Activity 4 out of 8

Title

Phone setup

Description

Setting up a CRM dialer and record a personalized voicemail message. Your voicemail often serves as a potential client's first contact with you, so make it count!

Here's a simple structure for your voicemail message:

"Hi, this is [Your Name] with [Brokerage Name]. I'm sorry I missed your call. Please leave your name, number, and a brief message, and I'll get back to you as soon as I can. Thank you, and have a great day!"



Onboarding: Technology Setup (2 days)

Activity 5 out of 8

Title

Email setup

Description

Request your new email account to be created. Once your email is ready add a professional email signature. Include your full name, title, brokerage name, phone number, and email address. You can also add a professional headshot and links to your social media profiles or website.

- Name & Title – Full name and professional title (e.g., Realtor®, Broker).
- Brokerage – Name and logo for branding and compliance.
- Contact Info – Phone, email, and website link.
- Social Media – Links to professional accounts like Instagram or LinkedIn.
- Photo – A professional headshot for a personal touch.
- Tagline (Optional) – A short slogan like “Your Local Market Expert.”
- Compliance Info – Include any required disclaimers or licensing details.
- Call to Action – Link to schedule consultations or browse listings.

A well-designed signature helps you stand out and ensures your contact information is easily accessible. Once you've set it up, send a test email to yourself to see how it looks.



Onboarding: Technology Setup (2 days)

Activity 6 out of 8

Title

Complete MLS training

Description

The Multiple Listing Service (MLS) is a comprehensive database that real estate professionals use to share and access property listings. It serves several key purposes:

1. Listing Distribution: Agents can list properties, increasing visibility and attracting potential buyers.
2. Market Data: The MLS provides valuable data on sales prices and neighborhood statistics, helping agents and clients make informed decisions.
3. Collaboration: It fosters collaboration among agents, facilitating smoother transactions.
4. Standardization: The MLS ensures consistency in property listings, making information reliable for buyers and sellers.

Complete your MLS training [Link]. This training will equip you with the knowledge and skills to navigate the Multiple Listing Service effectively, allowing you to access crucial market data, manage listings, and connect with potential buyers and sellers.



Onboarding: Technology Setup (2 days)

Activity 7 out of 8

Title

Transaction management system training

Description

A Transaction Management System (TMS) is a digital platform that streamlines the real estate transaction process, helping agents manage documents, track deadlines, and collaborate with clients and other professionals in one centralized location. It ensures that all paperwork is organized, reducing the risk of errors and improving efficiency.

Transaction management training: [\[Link\]](#)

We invite you to complete the training course, as it will equip you with the skills to effectively navigate the system, enhance your workflow, and provide exceptional service to your clients.



Onboarding: Technology Setup (2 days)

Activity 8 out of 8

Title

Apps & Tools

Description

1. CMA (Comparative Market Analysis) Tools
 - Cloud CMA, ToolkitCMA – For creating professional CMA reports.
2. Marketing Tools
 - Canva – For creating social media posts, flyers, and other marketing materials.
 - Mailchimp – For email campaigns to stay in touch with clients.
3. Scheduling and Appointments
 - Calendly, ShowingTime – For managing client appointments and property showings.
4. Lead Generation Platforms
 - Zillow Premier Agent, REDX – For connecting with potential buyers and sellers.
5. Social Media Management
 - Hootsuite, Later – For scheduling and managing social media posts across platforms.
6. Communication
 - Zoom, Slack, Google Meet – For virtual meetings and team collaboration.
7. Expense and Mileage Tracking
 - QuickBooks, MileIQ – For managing finances and tracking business expenses.



Phase 3

Personal Brand & Online Presence

10 activities | 3 days

Prepared by
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Onboarding: Personal Brand & Online Presence (3 day)

Activity 1 out of 10

Title

Take a professional headshot

Description

Your professional headshot is one of the first things potential clients and industry peers will see—it's your chance to make a great first impression! We strongly encourage every agent to invest in a high-quality headshot that reflects your personal brand and professionalism. A polished, well-composed photo can enhance your credibility, build trust, and help you stand out in a competitive market.

To help you get started, we've partnered with [Photography Studio Name] to offer professional headshots at a discounted rate. During your session, you'll work with a photographer who understands the real estate industry and knows how to capture the confidence and approachability clients look for in an agent.

Whether it's for your business cards, website, or social media profiles, a great headshot is an essential tool in your marketing toolkit. Schedule your session today and let your best self shine through!



Onboarding: Personal Brand & Online Presence (3 day)

Activity 2 out of 10

Title

Write your agent bio

Description

An agent bio is a brief summary that highlights a real estate agent's professional background, skills, and personal attributes, helping to establish credibility and build connections with potential clients. A great agent bio combines professional experience with a personal touch, showcasing not only the agent's qualifications but also their commitment to helping clients achieve their real estate goals.

Example: "Jane Smith is an experienced and results-driven real estate professional in the [City/Region] market, specializing in helping clients buy and sell homes for the best price and terms. Known for her exceptional negotiation skills and keen market insights, Jane is dedicated to understanding her clients' unique needs and guiding them through every step of the process. She leverages her expertise to secure the ideal home or maximize the sale of a property. Outside of real estate, Jane enjoys hiking, volunteering at local shelters, and exploring new restaurants with her family. With a focus on integrity and personalized service, Jane ensures her clients feel confident and supported in achieving their real estate dreams."



Onboarding: Personal Brand & Online Presence (3 day)

Activity 3 out of 10

Title

Create / update your website

Description

Having a personal real estate agent website is essential for establishing your online presence and showcasing your brand. It serves as a central hub where potential clients can learn about your services, view property listings, read testimonials, and access valuable resources. A well-designed website enhances your credibility, helps you stand out in a competitive market, and allows you to capture leads through contact forms and newsletter sign-ups.

Many agents over-complicate websites with sophisticated functionality like IDX search. However, clients normally prefer to use other platforms to search for properties. Instead, make sure your website has an easy-to-use and visible contact form to collect contact details from clients who want to inquire about your services.

Use your website link across all your online profiles and social media platforms.



Onboarding: Personal Brand & Online Presence (3 day)

Activity 4 out of 10

Title

Get your business cards

Description

Business cards are simple yet essential tool for real estate agents. Whether physical or virtual, they provide an easy way to share your contact information and make a lasting impression. A well-designed business card helps establish your professionalism and credibility while keeping you top-of-mind for potential clients and referrals.

In an industry built on relationships, having your contact details readily available ensures you're always prepared to connect, network, and grow your business.



Onboarding: Personal Brand & Online Presence (3 day)

Activity 5 out of 10

Title

Setup or update your Facebook profile

Description

We recommend using Facebook and other social media platforms that resonate with your style of content.

Here's how to effectively set up or update your profiles to highlight your new affiliation:

1. Update Your Bio and Profile Information

Start by updating your bio to include your new brokerage name. Mention your role as a real estate agent and include any specialties or areas of focus. For example: "Excited to be part of [Brokerage Name]! I'm dedicated to helping clients find their dream homes in [City/Region]."

2. Change Your Profile Picture and Cover Photo

Consider updating your profile picture to a more professional one if you haven't already. Use a high-quality image that conveys approachability and professionalism. Additionally, you can update your cover photo to reflect your new brokerage's branding or showcase a stunning property you're representing.

3. Announce Your New Position

Make a post announcing your new position at [Brokerage Name]. Share your excitement about this new chapter in your career, express gratitude to your previous brokerage (if applicable), and highlight what this change means for your clients. This is also an opportunity to engage with your audience and invite them to connect with you at your new firm.

4. Link to Your New Brokerage Website

Make sure to include a link to your new brokerage's website or your personal agent page in your profile. This makes it easy for potential clients to learn more about you and your services.

5. Engage with Your New Brokerage's Content

Follow your new brokerage's social media accounts and engage with their content. Share their posts, comment on their updates, and participate in their events. This not only showcases your affiliation but also helps you integrate into your new community.

6. Utilize Hashtags and Keywords

Incorporate relevant hashtags and keywords in your posts to increase visibility. Use tags like #[City]RealEstate, #[BrokerageName], or #[YourNameRealEstate] to attract potential clients and fellow agents who may be searching for real estate content.



Onboarding: Personal Brand & Online Presence (3 day)

Activity 6 out of 10

Title

Setup or update your LinkedIn profile

Description

We recommend using LinkedIn and other social media platforms that resonate with your style of content.

Here's how to effectively set up or update your profiles to highlight your new affiliation:

1. Update Your Bio and Profile Information

Start by updating your bio to include your new brokerage name. Mention your role as a real estate agent and include any specialties or areas of focus. For example: "Excited to be part of [Brokerage Name]! I'm dedicated to helping clients find their dream homes in [City/Region]."

2. Change Your Profile Picture and Cover Photo

Consider updating your profile picture to a more professional one if you haven't already. Use a high-quality image that conveys approachability and professionalism. Additionally, you can update your cover photo to reflect your new brokerage's branding or showcase a stunning property you're representing.

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Onboarding: Personal Brand & Online Presence (3 day)

Activity 7 out of 10

Title

Setup or update your Zillow profile

Description

Setting up or updating your Zillow profile is essential for enhancing your online presence and attracting potential clients. Start by claiming or creating your profile on each platform, ensuring your brokerage information is current.

Update your bio to reflect your unique skills and commitment to client service, and don't forget to upload a professional headshot.

Showcase your active listings with high-quality images and detailed descriptions to capture buyers' attention. Additionally, encourage satisfied clients to leave positive reviews, as these significantly enhance your credibility.

By regularly engaging with your profiles and utilizing the features these platforms offer, you can effectively connect with clients and elevate your real estate business!



Onboarding: Personal Brand & Online Presence (3 day)

Activity 9 out of 10

Title

Setup or update your Realtor.com profile

Description

Setting up or updating your [Realtor.com](https://www.realtor.com) profile is essential for enhancing your online presence and attracting potential clients. Start by claiming or creating your profile on each platform, ensuring your brokerage information is current.

Update your bio to reflect your unique skills and commitment to client service, and don't forget to upload a professional headshot.

Showcase your active listings with high-quality images and detailed descriptions to capture buyers' attention. Additionally, encourage satisfied clients to leave positive reviews, as these significantly enhance your credibility.

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Onboarding: Personal Brand & Online Presence (3 day)

Activity 10 out of 10

Title

Create Google My Business for Realtors

Description

Step 1: Sign in to Google

- Go to the Google Business Profile page.
- Click on the “Manage now” button.
- Sign in with your Google account. If you don’t have one, click on “Create account” to set one up.

Step 2: Enter Your Business Name

- In the search box, enter your business name (e.g., your name as a realtor or your brokerage name).
- If your business doesn’t appear, click on “Add your business to Google.”

Step 3: Choose Business Category

- Select a category that best fits your business. For real estate, you might choose “Real Estate Agent,” “Real Estate Agency,” or “Realtor.”
- Click “Next.”

Step 4: Add Your Location

- Choose whether you want to add a location customers can visit. If you have a physical office, select “Yes” and enter your address.
- If you operate remotely or prefer not to list an address, select “No.”
- If you selected “Yes,” ensure that your address is accurate on the map.

Step 5: Service Areas (if applicable)

- If you provide services in specific areas, you can add those locations. This is especially useful if you work in multiple neighborhoods or cities.
- Click “Next.”

Step 6: Contact Information

- Enter your phone number and website URL (if you have one). If you don't have a website, you can choose to create a free Google Site.
- Click "Next."

Step 7: Finish and Verify

- Click "Finish." You may need to verify your business. Google typically sends a postcard to the address you provided, which contains a verification code.
- Follow the instructions on the postcard to verify your business once you receive it.

Step 8: Complete Your Profile

- After verification, go back to your Google Business Profile.
- Add additional information, such as business hours, services offered, and a description of your real estate services. Use keywords relevant to your business to improve search visibility.
- Upload high-quality photos, including your profile picture and images of properties you represent, to make your profile more attractive.

Step 9: Engage with Clients

- Encourage satisfied clients to leave reviews, as positive feedback can boost your reputation and visibility.
- Regularly update your profile with posts about recent sales, listings, and community events to keep your audience engaged.



Phase 4

Goal Setting & Accountability

5 activities | 1 day

Prepared by
[Agently.com](https://www.agently.com)



Onboarding: Goal Setting & Accountability (1 day)

Activity 1 out of 5

Title

Understanding your "Why?"

Description

Understanding your "Why" is the foundation of your success as a real estate agent. Your "Why" is the deeper reason you chose this career—whether it's to achieve specific financial objectives, provide a better life for your family, or have the flexibility to balance work and personal life.

Real estate is a marathon, not a sprint, and knowing your "Why" will keep you motivated and focused for the long haul. Whether your goal is to become a top producer or work part-time, your "Why" will serve as your compass, helping you stay accountable, make better decisions, and remain committed to building a business that aligns with your dreams and values.



Onboarding: Goal Setting & Accountability (1 day)

Activity 2 out of 5

Title

Set your 12-month income goal (GCI)

Description

Goal-setting is an important step for every real estate agent. Using this app you can create your personalized Business Blueprint.

Tap "My Goal" > Edit goal to see get your Blueprint.

The Business Blueprint converts your 12-month income goal showing what actions you would need to take on a monthly, weekly, and daily basis to reach your goal.

This will help you set ambitious but achievable goals while setting the right expectations of what it would take to get there.



Onboarding: Goal Setting & Accountability (1 day)

Activity 3 out of 5

Title

What it takes to succeed in real estate

Description

Success in real estate comes down to one simple truth: the more people you talk to, the more opportunities you create. Real estate is a people business, and every conversation is a chance to build a relationship, uncover a need, or help someone with their next big move.

Often agents get caught up chasing shiny objects looking for shortcuts to success.

There is no shortcut to success in real estate.

Whether it's meeting new people, following up with past clients, or reaching out to leads, consistency is key. The more conversations you start, the closer you'll get to achieving your goals.

Keep it simple:

1. Have 5 conversations about real estate every day 5 days a week
2. Add those contacts to your CRM
3. Follow up regularly

By the end of the year this simple strategy will help you fill your database with 1300+ contacts. Converting just 2% will help you close 25+ transactions per year.

Don't get distracted by shiny objects promising you overnight success, stay focused and consistent with your daily actions, keep it simple, and watch your business grow! If your goal is to be the top 1% you must do what the other 99% won't.



Onboarding: Goal Setting & Accountability (1 day)

Activity 4 out of 5

Title

Time management & daily schedule

Description

Consistency is the cornerstone of success in real estate, and achieving it requires you show up every day. Having a daily routine will help you focus on what really matters for your business. A solid routine eliminates distractions, keeps you accountable, and ensures you're consistently making progress.

Here are the activities for you to time-block in your schedule.

1. **Lead Generation Preparation:** Start your day by organizing your outreach efforts. This includes making a list of contacts to reach out to, practicing your scripts, and gathering any materials you'll need to connect with potential clients effectively.
2. **Lead Generation:** Talking to people is what drives your business forward. Whether it's calling FSBO, following up on expired listings, or reaching out to your database, this is the time to engage and build connections.
3. **Reply to clients & follow up:** Avoid getting distracted by responding to every text, call, or email immediately unless it's a priority. Instead, set specific times during your day to handle communications. This approach helps you stay focused and maximizes efficiency.
4. **Lead Conversion:** Dedicate time to nurturing relationships and turning leads into clients. Focus on those prospects who have shown genuine interest or sent inquiries—such as scheduling appointments for home showings or consultations.
5. **Showings and Listings:** Plan your showings and listing appointments after your lead generation and conversion efforts. Ideally, these should result directly from the groundwork you've already laid.
6. **Lunch and Personal Responsibilities:** Don't neglect your well-being. Schedule time for meals, exercise, or personal errands in your day. Real estate success is about balance—taking care of yourself ensures you can show up at your best for clients and your business.

Here's a sample schedule you can adopt

- 8:00 - 8:30 AM — Lead Generation Prep
- 8:30 - 11:00 AM — Lead Generation
- 11:00 - 12:00 PM — Replies & follow ups
- 12:00 - 1:00 PM — Lunch
- 1:00 - 2:00 PM — Lead Conversion
- 2:00 - 3:00 PM — Replies & follow ups
- 3:00 - 6:00 PM — Appointments



Onboarding: Goal Setting & Accountability (1 day)

Activity 5 out of 5

Title

Stay accountable to your business

Description

As a real estate agent and business owner, you are 100% responsible for your success. Staying accountable means taking full ownership of your actions and results.

That's why it is so important to track your progress.

Use tools like this app, CRM, spreadsheet, or accountability journal to track your daily activities.

Self-accountability could be challenging so finding an accountability partner, coach, or mentor to hold you accountable can help keep you on track. Remember, no one else will build your business for you—your success depends on your commitment, consistency, and willingness to do the work every single day.

When challenges arise or progress feels slow, reconnecting with your "Why" will remind you of your purpose and reignite your determination. It's the anchor that keeps you grounded and focused, helping you push through obstacles and stay on track toward your goals.



Phase 5

Transactions & Commission Structure

8 activities | 1 day

Prepared by
[Agently.com](https://www.agently.com)



Onboarding: Transactions & Commission Structure (1 day)

Activity 1 out of 8

Title

The key stages of a real estate transaction

Description

The key stages of a real estate transaction, whether buying or selling, include several crucial steps.

- First is listing or finding a property, where the seller lists the home and the buyer searches for the right property.
- Next, negotiation and offer, where the buyer makes an offer, and the seller accepts or counters.
- Once an agreement is reached, both sides enter the contract phase, where terms are finalized, and necessary documents are signed.
- Then, due diligence begins, involving inspections, appraisals, and securing financing.
- Finally, the process concludes with closing, where the ownership is officially transferred, and keys are exchanged.



Onboarding: Transactions & Commission Structure (1 day)

Activity 2 out of 8

Title

The role of a transaction coordinator

Description

A real estate transaction coordinator plays a vital role in ensuring a smooth and organized transaction process. They manage the administrative tasks from contract to closing, including tracking deadlines, preparing and reviewing documents, coordinating inspections, and communicating with all parties involved, such as agents, lenders, and escrow officers. Their goal is to ensure that every step of the transaction is completed on time and in compliance with legal and brokerage requirements, helping agents focus on client relationships and negotiations while minimizing errors and delays.



Onboarding: Transactions & Commission Structure (1 day)

Activity 3 out of 8

Title

Key documents in a real estate transaction

Description

Buyer representations agreement and listing agreement establish a formal contract between a buyer/seller and a real estate agent or brokerage, giving the agent the authority to represent the client in a real estate transaction. It outlines key terms such as the duration of the agreement, the agent's compensation, and the specific responsibilities. These agreements ensure that both parties understand their obligations and provides legal protection while giving the agent the exclusive right (or in some cases, non-exclusive right) to represent the client.

Purchase agreement, outlines the terms of the sale, including price and conditions. Disclosures are required to inform buyers about any known issues with the property. The title report verifies legal ownership and any liens on the property. Additionally, the inspection report details the property's condition, while the loan documents are needed if the buyer is financing the purchase. Finally, the closing statement outlines all financial transactions, ensuring all parties understand the costs involved.



Onboarding: Transactions & Commission Structure (1 day)

Activity 4 out of 8

Title

Transaction Management System

Description

The purpose of a Transaction Management System (TMS) is to streamline and organize the real estate transaction process, ensuring that every step from contract to closing is efficiently managed. A TMS helps agents track important deadlines, store and manage documents, facilitate e-signatures, and maintain communication with clients and other parties involved in the deal. By providing a centralized platform for handling tasks, it reduces errors, ensures compliance with legal and brokerage requirements, and saves time, allowing agents to focus more on client relationships and business growth.



Onboarding: Transactions & Commission Structure (1 day)

Activity 5 out of 8

Title

Compliance & Legal Considerations

Description

- Common legal pitfalls and how to avoid them.
- Importance of timely submission of documents and record-keeping.
- Staying compliant with local real estate regulations and brokerage policies.



Onboarding: Transactions & Commission Structure (1 day)

Activity 6 out of 8

Title

Understanding the Commission Structure

Description

- Commission split structure
- How commission splits work (with example)
- Timing of commission payment (when and how commissions are disbursed after closing)
- How caps, fees, and transaction-based expenses impact commission payout.



Onboarding: Transactions & Commission Structure (1 day)

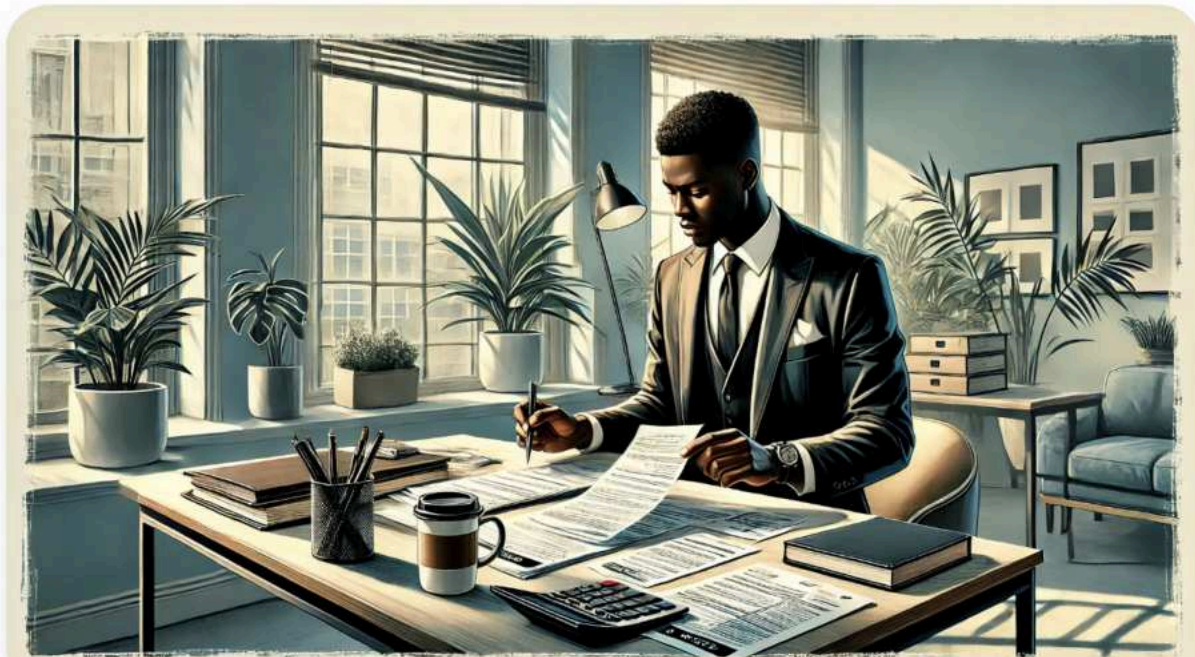
Activity 7 out of 8

Title

Taxes and Commission Income

Description

- Importance of setting aside money for taxes (self-employment tax considerations).
- Overview of deductible business expenses (e.g., marketing, client gifts, transportation).
- How to track commissions and expenses for tax filing.



Onboarding: Transactions & Commission Structure (1 day)

Activity 8 out of 8

Title

Bonuses, Referrals, and Other Income Sources

Description

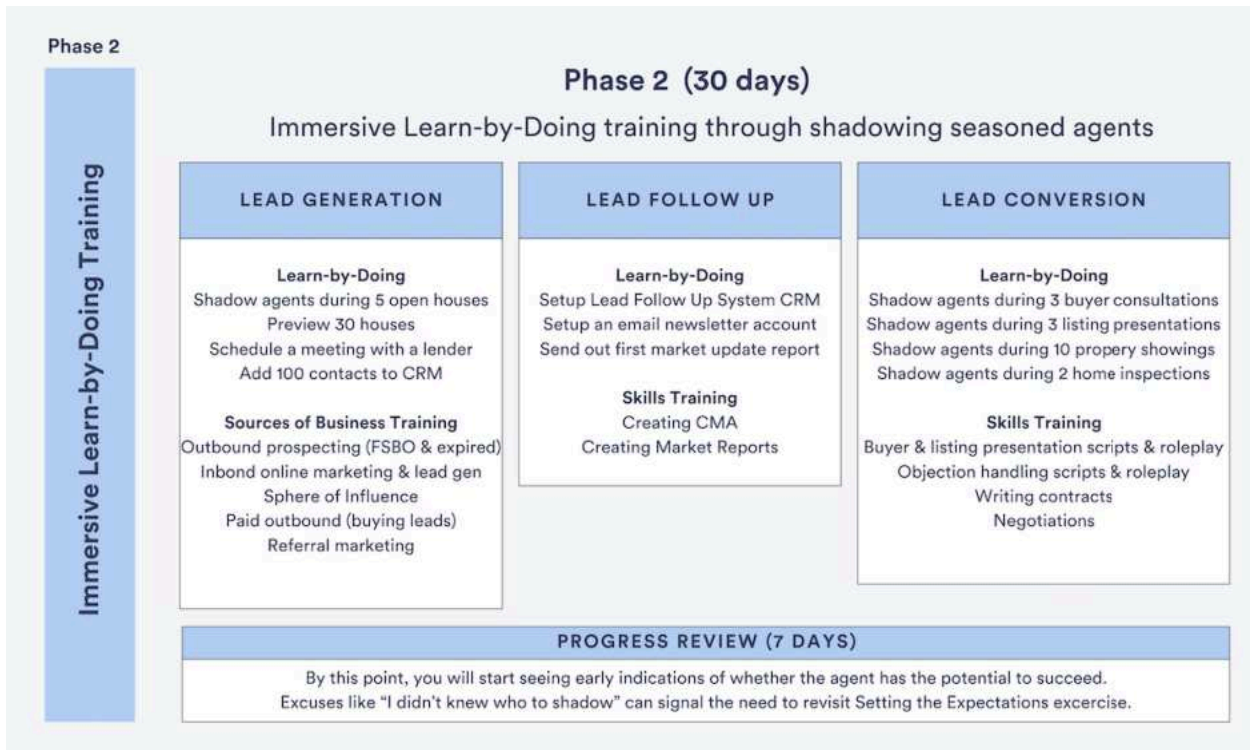
- Overview of bonuses and incentives offered by brokerages.
- How referral fees work when you refer a client to another agent.
- Special situations: Leasing commissions, commercial deals, and team-based commission structures.

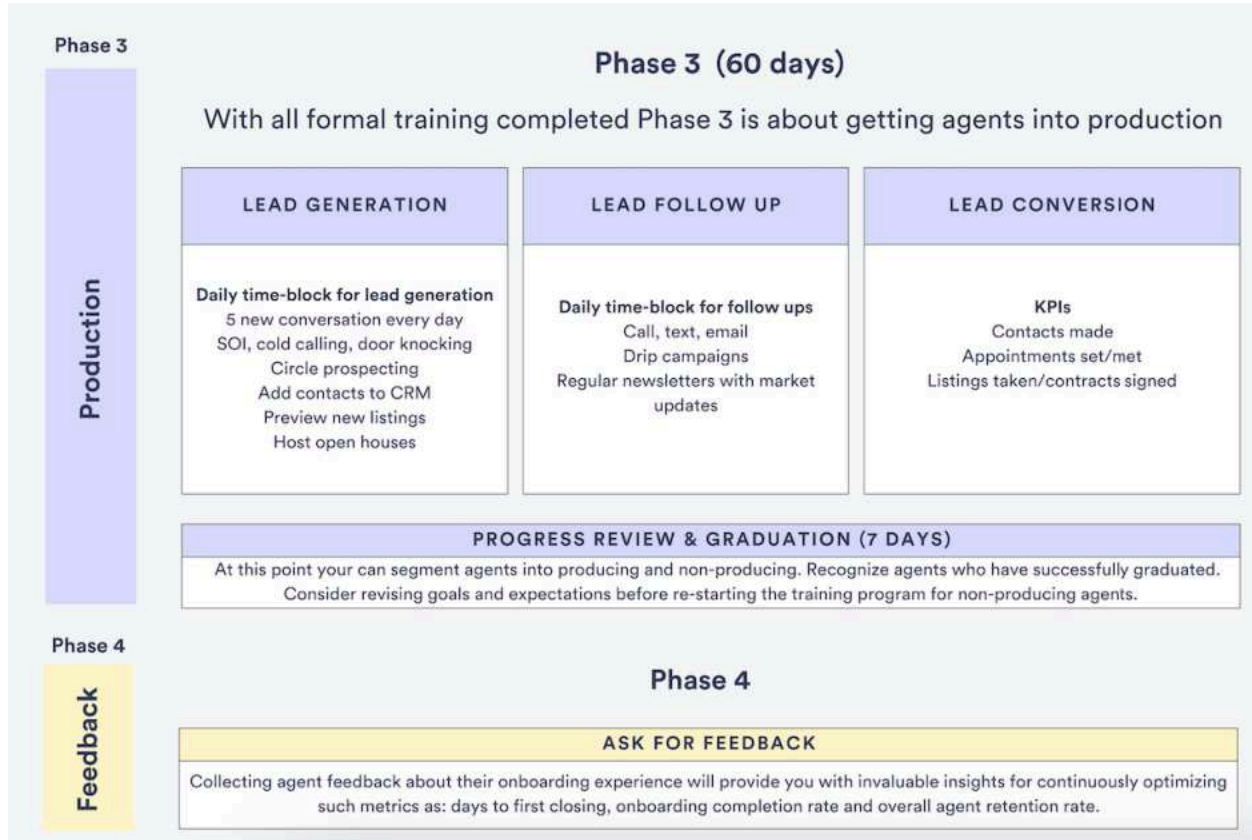


Onboarding Roadmap

Prepared by
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Bonus: 250 SOL ideas

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1. Who is your dentist?
2. Who is your children's dentist?
3. Who is your doctor?
4. Who is your partner's doctor?
5. Who is your children's doctor?
6. Who is your dermatologist?
7. Who does your taxes?
8. Who cuts your grass?
9. Who does your landscaping?
10. Who does your household repairs?
11. Who maintains your security system?
12. Who sold you window coverings?
13. Who is your painter?
14. Who is your plumber?
15. Who is your electrician?
16. Who treats your home for pests?
17. Who cleans your carpet?
18. Who cleans your windows?
19. Who services your A/C and heat?
20. Who are your former teachers?
21. Who did you go to high school with?
22. Who is your trainer?

23. Who are your children's teachers?
24. Who are your children's coaches?
25. Who are your close friends?
26. Who are your partner's close friends?
27. Who are your parent's close friends?
28. Who are your spouse's co-workers?
29. Who attended your wedding?
30. Who sold you your car?
31. Who do you buy your gasoline from?
32. Who does your auto repair?
33. Who are the members of your family?
34. Who are your extended family members?
35. Who does your manicures/pedicures?
36. Who does your facials?
37. Who is your hairstylist?
38. Who are your best friends?
39. Who sold you jewelry?
40. Who is your florist?
41. Who is your pharmacist?
42. Who is your optometrist?
43. Who do you go to for a massage?
44. Who sold you furniture?
45. Who repairs your furniture?
46. Who do you buy appliances from?

47. Who do you buy cosmetics from?
48. Who do you buy nutritional products from?
49. Who is your butcher?
50. Who do you buy seafood from?
51. Who installed your internet?
52. Who repairs your computer?
53. Who do you buy your electronics from?
54. Who services your appliances?
55. Who is your life insurance agent?
56. Who is your agent for homeowner insurance?
57. Who is your agent for auto insurance?
58. Who is your agent for health insurance?
59. Who do you buy business attire from?
60. Who do you go to for alterations?
61. Who is your tax preparer?
62. Who is your accountant/CPA?
63. Who is your banker/lender?
64. Who is your stock broker?
65. Who is your veterinarian?
66. Who is your pet sitter?
67. Who grooms your pet?
68. Who is your eye doctor?
69. Who is your lawyer?
70. Who are your former co-workers?

71. Who is your dietitian?
72. Who is your local printer?
73. Who lives on either side of you?
74. Who lives across the street?
75. Who was in your wedding?
76. Who officiated your wedding?
77. Who was your wedding photographer?
78. Who was your wedding coordinator?
79. Who trims your trees?
80. Who did you go to school with?
81. Who does your dry cleaning?
82. Who do you buy tires from?
83. Who delivers your mail?
84. Who do you travel with?
85. Who do you go to theater with?
86. Who are your golf buddies?
87. Who do you play tennis with?
88. Who do you play cards with?
89. Who are your hunting/fishing friends?
90. Who are your hobby friends?
91. Who do you know from church?
92. Who is in your fantasy sports leagues?
93. Who owns your favorite restaurant?
94. Who is your favorite server?

95. Who do you know in the government?
96. Who did you go to college with?
97. Who is your minister/clergy?
98. Who do you know from the country club?
99. Who do you know from the gym?
100. Who do you know from daycare?
101. Who do you know from your HOA?
102. Who is your police/fire chief?
103. Who have you met at trade shows?
104. Who have you met at a charity function?
105. Who do you buy camping equipment from?
106. Who is your housekeeper?
107. Who delivers your water?
108. Who are your previous neighbors?
109. Who are your military cohorts?
110. Who are retired co-workers?
111. Who do you know that is an architect?
112. Who is the wealthiest person you know?
113. Who do you know that is a baker?
114. Who do you know that is an entertainer?
115. Who do you know in human resources?
116. Who do you buy office supplies from?
117. Who is on your holiday card list?
118. Who's holiday card list are you on?

119. Who did you meet on a plane?
120. Who is the most successful leader you know?
121. Who do you know that knows everyone?
122. Who's the best sales person you know?
123. Who sells Mary Kay/Pampered Chef?
124. Who is your landlord?
125. Who do you see in your office bldg?
126. Who built your house?
127. Who would you call to fix a leak?
128. Who do you know in law enforcement?
129. Who have you met at a party recently?
130. Who do you know that is a golf pro?
131. Who do you know that is a tennis pro?
132. Who do you know that is a notary?
133. Who do you know that is a photographer?
134. Who is your financial advisor?
135. Who manages your retirement accounts?
136. Who designed your garden?
137. Who installed your sprinkler system?
138. Who repairs your sprinkler system?
139. Who do you buy plants and flowers from?
140. Who installed your swimming pool?
141. Who maintains your swimming pool?
142. Who is your favorite bartender?

143. Who is your real estate agent?
144. Who sold you your last home?
145. Who inspected your home before purchase?
146. Who appraised your home?
147. Who do you know that works at a bank?
148. Who is your favorite local artist?
149. Who framed your artwork?
150. Who do you know in construction?
151. Who helped you move into your home?
152. Who do you rent tools or equipment from?
153. Who is your yoga instructor?
154. Who do you know from pilates classes?
155. Who do you know from running groups?
156. Who sells fitness equipment?
157. Who tunes your piano?
158. Who repaired your bike?
159. Who do you know that is a DJ?
160. Who was your childhood best friend?
161. Who are your children's friends' parents?
162. Who is your favorite Uber/Lyft driver?
163. Who do you know in event planning?
164. Who is your wedding florist?
165. Who catered your last event?
166. Who do you buy groceries from?

167. Who do you know that owns a food truck?
168. Who do you know that is a pastry chef?
169. Who do you know that is a chocolatier?
170. Who sold you your mattress?
171. Who do you know in hospitality?
172. Who do you know in retail?
173. Who do you know in the military?
174. Who do you know that is a firefighter?
175. Who do you know that is a paramedic?
176. Who do you know in aviation?
177. Who do you know that owns a boat?
178. Who do you know from book clubs?
179. Who do you know from sports leagues?
180. Who do you know from community service?
181. Who do you know that works for a nonprofit?
182. Who do you know that is a philanthropist?
183. Who do you know that owns a startup?
184. Who do you know in marketing?
185. Who do you know in public relations?
186. Who do you know in tech?
187. Who do you know in education?
188. Who do you know that is a professor?
189. Who is your favorite librarian?
190. Who do you know from travel groups?

191. Who do you know from car clubs?
192. Who do you know in the fashion industry?
193. Who do you know in the film industry?
194. Who do you know in the music industry?
195. Who do you know that is a podcaster?
196. Who do you know that is an author?
197. Who do you know that is a blogger?
198. Who do you know that is an influencer?
199. Who do you know that works at a museum?
200. Who do you know in government service?
201. Who do you know that runs for public office?
202. Who do you know that works in healthcare?
203. Who do you know in environmental services?
204. Who do you know in transportation?
205. Who do you know that owns a winery?
206. Who do you know that owns a brewery?
207. Who do you know that owns a distillery?
208. Who do you know that is a chef?
209. Who do you know that is a food critic?
210. Who do you know that is a winemaker?
211. Who do you know in interior design?
212. Who do you know that is a decorator?
213. Who do you know that is a furniture maker?
214. Who do you know that works in logistics?

215. Who do you know in human resources?
216. Who do you know that works in security?
217. Who do you know that is a recruiter?
218. Who do you know that is a career coach?
219. Who do you know that is a leadership coach?
220. Who do you know that is a life coach?
221. Who do you know in healthcare administration?
222. Who do you know that is a historian?
223. Who do you know in cultural organizations?
224. Who do you know that runs a daycare?
225. Who do you know that is a nanny?
226. Who do you know that is a doula?
227. Who do you know that is a midwife?
228. Who do you know that runs a community center?
229. Who do you know that is a professional speaker?
230. Who do you know that is a sports coach?
231. Who do you know that owns a fitness studio?
232. Who do you know that is a fashion stylist?
233. Who do you know that is a makeup artist?
234. Who do you know that is a costume designer?
235. Who do you know that is a travel agent?
236. Who do you know that is a tour guide?
237. Who do you know that runs a B&B?
238. Who do you know that is a carpenter?

239. Who do you know that is a mason?
240. Who do you know that is a roofer?
241. Who do you know that is a welder?
242. Who do you know that is a mechanic?
243. Who do you know that is a sound engineer?
244. Who do you know that is a graphic designer?
245. Who do you know that is a video editor?
246. Who do you know that is an animator?
247. Who do you know that is an app developer?
248. Who do you know that is a game developer?
249. Who do you know that owns a farm?
250. Who do you know that runs a farmer's market?

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