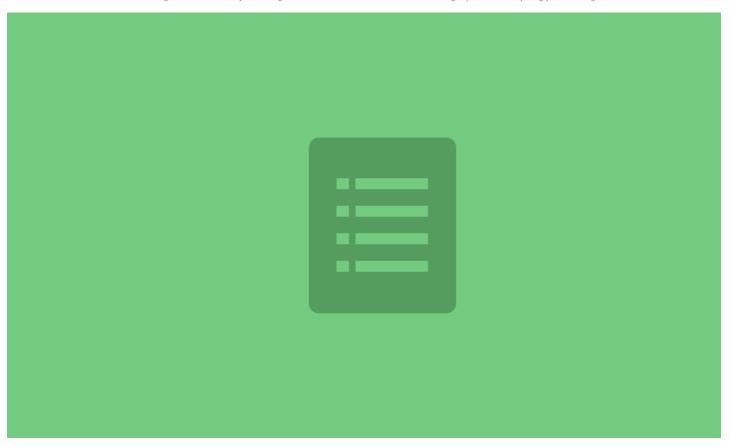# Real Estate Agent Onboarding Checklist

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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