Sample Onboard New Sales Team Member

TomFerry™

To be added to LMS (Learning Management System)
(Trello, Google Drive, Trainual, ASANA, etc.)
Links to Learning Videos should be included

1. **Before First Day**
    a. Run background check
    b. Run DRE check (If licensed already)
    c. Have them remove license from other brokerage
    d. Get all Association of Realtor application filled out
    e. Fill out Broker Paperwork
    f. Sign Team Contract
    g. License transfer completed
    h. Intro email to new hire
        - Includes
            1. Schedule of daily/weekly/monthly meetings
            2. Agenda of what these meetings include
                - Weekly intentions, success stories, gratitudes (come prepared)
            3. Bring a voided check or bank statement for routing numbers
            4. Two forms of identification: Driver's License & Social Security Card

2. **First Day Agreements & Sign up - Meets with TL or OPS**
    a. Go to Association take paperwork and get iPhone updated for Supra access (team member)
        - New agent pays for dues and any MLS/Association related fees
        - Schedule training classes and new agent orientation
    b. All banking information or direct deposit (if Applicable)
    c. W-9 Form
    d. Set up Gmail & Google Calendar (Asst/Team Lead)
    e. Set up time for professional photo
    f. Get office keys
    g. Franchise paperwork

3. **First Week Set up and training**
    a. Intro email to new hire
        - Includes
            1. Schedule of daily/weekly/monthly meetings
            2. Agenda of what these meetings include
                - Weekly intentions, success stories, gratitudes (come prepared)
    b. Order Business Cards
    c. Set up following on team members laptop, phone, ipad etc.

- Gmail
- Calendar
- MLS App
- CRM App
- dropbox (future)
- google drive (future)
- docusign (future)
- zipform (future)
- Realtor.com
- Zillow.com
- Evernote
- audible

d. Write Bio for website and LinkedIn

e. Update all social media sites with new job status/info

- Facebook
- LinkedIn
- Twitter
- Instagram
- about.me

4. Second Week Set Up and Training

a. Organize all personal SOI (using questionnaire) into Google worksheet with Name, Email, Phone, Address

b. Set up calendar for "The Perfect Day" prospecting

c. Learning Scripts & Dialogue/Become Script Certified

d. Group prospecting Monday-Thursday 9-11 am

e. Schedule New Agent Weekly Training

f. Schedule Monthly Business Plan Session and Recap

g. Monthly ALL STAFF Training sessions

- current challenges
- Numbers
- Achievements
- Goals
- Sales Training - Half the meeting
  1. Scripts & Dialogue
  2. Buyer Objections
  3. Seller Objections
  4. Securing Appts over the phone
  5. Getting a contract signed (listing, purchase, buyer/broker)

5. Ongoing

a. Apprentice program
- teamed with experienced agent/mentor for first 6 transactions
- unlimited access to this mentor
- 10% of commission on first 6 transactions go to mentor/Pod leader

6. Building Team Rapport and Retention

a. All joinprivate facebook page for team or slack channel
- Types of posts
  1. Fun
  2. Inspirational
  3. Business Related
  4. Important Communications
  5. Accomplishments
  6. Ask for advice
  7. Share Referrals

b. Host group activities and events
- Friday Afternoon Club
  - monthly social hour one friday per month at the office to socialize, have fun and relax.
- Group Prospecting
  - 9-11 am Monday-Thursday
- Neighborhood Networking Groups
  - Emphasize networking and relationship building in a certain part of the town.
- Network Events
  - Host evening network events to bring together local business leaders and community members.
  - Food/beverage provided

c. Create Traditions
- Having meeting at an odd time of day or standup/walking meeting
- Ringing a bellfor major accomplishments (listing, closing, new agent joins etc)
- Annual Retreat
- Themed teem meetings/Call Nights
  - ie: carve pumpkins while reviewing seller objection handlers
  - Dialing for Dollars
  - Competition

- First 30 Day Checkin
  - Tracking/measuring (CTE/SISU)
  - Pending
  - Open Houses
  - Participation

Curated and Created by Yvonne Arnold (2021-2022)