##### **Keller Williams Realty Eugene & Springfield**

##### **Orientation Checklist**

###### Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Meet with Katie DeWitt - CEO/Team Leader**

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| --- | --- |
| Keller Williams Overview |  |
| Sign KW Contract |  |
| Review Office Fees |  |
| Choose a Profit Share Sponsor |  |
| Welcome Tour |  |
| Receive Welcome E-mail from the Executive Team |  |
| Make an appointment with Agent Services Coordinator |  |

1. **Meet with Nicole Wedertz– Agent Services Coordinator**

*Bring Car Insurance Card , Voided Check, and $199 Start-up Check*

|  |  |
| --- | --- |
| Attend New Agent Orientation to learn about your KW e-mail, database, website, and other office information & tour |  |
| Receive KW office information (e-mail, phone, copy codes, security codes, and login information) |  |
| Turn in Car Insurance info & Voided Check |  |
| Receive a Key Fob for building access |  |
| Go through workstation training for printing, copying, and scanning |  |
| Go through security and building access info |  |
| Sign up for New Agent Onboarding w/ Scott LeRoy (if needed) |  |
| Make an appointment with Tom Dye, Reviewing Broker |  |

1. **Meet with Tom Dye – Reviewing Broker**

|  |  |
| --- | --- |
| Review RMLS forms and answer questions about RMLS |  |
| Review EAR, OAR, and NAR membership and fee information |  |
| Make an appointment with Patty Harris from RMLS |  |
| Make an appointment with our Market Center Administrator |  |
|  |  |

**4. Meet with Tonja- Market Center Administrator (MCA)**

|  |  |
| --- | --- |
| Learn about agent billing & pay $199 first month fee |  |
| Learn about potential office space |  |
| Learn about direct deposit options for commission checks and auto-pay. |  |

**5. Meet with Trenda LoVette – Marketing & Design Solutions**

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| --- | --- |
| Order business cards |  |
| Take professional headshot photo (if needed) |  |

**6. Attend New Agent Trainings**

**(Please always refer to KW Calendar as changes may occur in dates and times of classes)**

|  |  |
| --- | --- |
| Dotloop Training  *1st & 3rd Tuesday of the month @ 10am* |  |
| **All Partner’s Meetings** held @ First American Title Co.  *Every other Tuesday @ 11am (this is for all agents to attend, includes training, recognition, and recent news in our industry and at KW)* |  |
| eEdge Training  *1st & 3rd Wednesday of the month @ 10am* |  |
| Greensheet Training  *2nd & 4th Thursday of the month @ 10am* |  |
| Contract Training  *1st & 3rd Friday @ 10am* |  |

**7. Homework**

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| Complete KW Profile on mykw.kw.com (Scott LeRoy will help) |  |
| Sign up for Zip Forms |  |
| Start setting up your database |  |
| Start making database calls |  |
| Meet w/ a Title company service rep (First American has a Title Company Bootcamp you can attend) |  |
| Meet w/ 3-5 Mortgage advisors to start establishing a relationship |  |
| Change Facebook employment status and write a post to let your friends know about your new career |  |
| E-mail New Agent card (eEdge marketing) to friends and family |  |
| Attend Ignite (if applicable) |  |
| Attend BOLD (if applicable) |  |