

# Onboarding Checklist ✓

## Agent TO DO Week One

Assigned

Date  
Complete

Hire Package Complete

Manager

Agent Selected WR Cornerstone as Broker in PALS

Agent

Order Business Cards & Name Tag - Agent Support

Support

Initial One on One Coaching

Manager

Join/Register for Weichert Fast Track and/or Success Track

Agent

Take Testimonial ("Why Weichert?") - For social Media

Agent

Agent to Schedule Meeting with MTS

Agent

Agent to Provide Headshot - to Agent Support

Agent

Agent to Explore Weichert University Training Moduals

Agent/MTS

Locate your Mailbox

Agent/Manager

Meet with Assured Financial Mortgage Advisor

Agent

Maintain a Calendar of Sales Meetings Dates/Times & Training Sessions

Agent

Office Tour

Manager

## Agent TO DO - Week Two

Date Assigned

Date  
Complete

Check for State License Activation

Agent/Manager

Set up your My Weichert Account

Agent/MTS

Explore Weichert University Training Sessions

Agent

Log into Broker Mint Transaction Software

Agent

Set up Database Sphere of Influence

Agent/MTS

Listing Presentation - Set Up Personalized Template

Agent/MTS

Share Resource for Professional Photography for Listings

Coach

Attend Office Sales Meeting

Agent

Shadow Coach - Listing Presentation, Open House, Buyer Presentation

Agent

Sign up for Tri-County Association of Realtors Orientation

Agent/Manager

Sign up for Bright MLS & Showing Time

Agent/Manager

Agent to Set Up myWeichert®	Agent/MTS	
<b>Tech Check</b>	<b>Assigned</b>	<b>Date Complete</b>
<b>Confirm Agent has access, they've got a complete profile set up &amp; know how to use</b>		
Connect Laptop to Company Internet	MTS	
Set-up Professional Email & Signature Line (G-Mail Preferred)	Agent/MTS	
Set-up Your Professional Voicemail on Office/Cell Phone	Agent	
Set up Agent Web Page in My Weichert	MTS	
Set up My Weichert	MTS	
Install Weichert Apps	Agent/MTS	
Review Important Work Websites	Agent	
Find Weichert Logos in Weichert Tools	Agent/MTS	
Connect to Office Printer	Agent/Support	
<b>Weichert Systems &amp; Profiles</b>	<b>Assigned</b>	<b>Date Complete</b>
<b>Confirm Agent can login, has a complete profile and give them a tour of the content.</b>		
Tour of Tools	MTS	
myWeichert	MTS	
Weichert Tools	MTS	
Weichert University	MTS	
David Knox Training - Weichert University (login with email, pw=firstinitial.last name)	Agent	
myMarketing Studio	MTS	
Quantum/Lead Link Account for Just Listed Cards (login with email, pw=last name)	MTS	
Approved Suppliers	MTS	
<b>myWeichert Orientation</b>	<b>Assigned</b>	<b>Date Complete</b>
<b>Explain &amp; Demonstrate All (or take a Quickstart Series video)</b>		

Bio/Profile/Photo - Check up	Agent/MTS	
Website Settings/Customizations	MTS	
SOI Import/Contacts Add	Agent/MTS	
Filters/Hash Tags/Status	Agent/MTS	
How to Call, Email & Text Using the System	MTS	
Activity Dashboard	MTS	
Smart Campaigns/Behavioral Automation	MTS	
Market Reports/Home Valuations/Search Alerts	MTS	
Landing Pages	MTS	
Squeeze Pages	MTS	
Promoting a Listing Playbook	MTS	
Testimonials	MTS	
Weichert Design Store Center	MTS	
Daily Routine/Lead Pipeline	Coach	
Find Quickstart Series in Weichert Tools		
<b>3rd Party Profiles</b>	<b>Assigned</b>	<b>Date Complete</b>
<b><i>Help them set up or update COMPLETE profile to your brand, as applicable</i></b>		
Realtor.com	Agent	
Homes.com	Agent	
Zillow	Agent	
Google Business Page	Agent	
Facebook Business Page	Agent	
Instagram, LinkedIn Youtube, etc.	Agent	
WREA Sales Professionals Page (closed WREA group on FB)	Agent	
RPR Account (NAR)	Agent	
<b>Prep for Client Meetings/Training</b>	<b>Assigned</b>	<b>Date Complete</b>
Review Fast Track Assignments (if applicable)	Coach	
Business Planning/Review Award Tiers	Manager	

Train on Sales Contract/Disclosures	Roundtbl/Coach	
Train on Listing Agreement/Disclosures	Roundtbl/Coach	
Doors - How to Create & Present: Pre-Listing Pkg, Getting to Know You, Presentation, PTA	Roundtbl/Coach	
Buyer Consultation - How to Create and Present	Roundtbl/Coach	
Open House Program	Coach	
Seller Scripts	WU	
Buyer Scripts	WU	
<b>Ready to Launch</b>	<b>Assigned</b>	<b>Date Complete</b>
SOI uploaded	Agent	
Welcome to the Team Announcement on Social	Support	
myWeichert Announcement to SOI	Agent	
Create and post I'm With Weichert Social Media Post	Agent	
Create and purchase Agent Banner Stand	Agent	
Create & send Direct Mail Announcement - I'm with Weichert - to SOI	Agent	
Create & send Direct Mail Announcement to Farm Area	Agent	
Schedule an Open House w/ Exp. Agent	Agent	
Order name riders/personal signs (if applicable)	Agent	
Associate Signature	Date	
Manager Signature	Date	







