

# Real Estate Agent Onboarding Checklist

Stage		Task	Description
Pre-Onboarding	<input type="checkbox"/>	Prepare Welcome Kit	Include company policies, culture document, and an outline of the first week's schedule.
Pre-Onboarding	<input type="checkbox"/>	Set Up Workstation	Ensure access to necessary office space, computer, and software tools.
Pre-Onboarding	<input type="checkbox"/>	Gather Essential Tools and Resources	Provide access to the MLS, real estate databases, and project management software.
Pre-Onboarding	<input type="checkbox"/>	Organize Administrative Processes	Set up email accounts, business cards, and necessary logins.
First Day	<input type="checkbox"/>	Warm Welcome	Make a positive first impression to integrate the new agent into the team.
First Day	<input type="checkbox"/>	Company Culture Introduction	Share the organization's culture, vision, and values.
First Day	<input type="checkbox"/>	Orientation Sessions	Cover administrative tasks, office tour, and introduce to the team.
First Day	<input type="checkbox"/>	Review Job Role and Expectations	Clarify responsibilities, goals, and how their role fits into the customer journey.
First Week	<input type="checkbox"/>	Training Program Initiation	Start with a structured training program focusing on customer interactions, services offered, and routine tasks.
First Week	<input type="checkbox"/>	Assign a Mentor	Implement a buddy system for support and guidance.
First Week	<input type="checkbox"/>	Encourage Shadowing Sessions	Allow shadowing experienced agents for practical learning.
Ongoing Training and Support	<input type="checkbox"/>	Regular Check-Ins and Feedback Sessions	Schedule weekly meetings for the first few months for progress review and to provide feedback.
Ongoing Training and Support	<input type="checkbox"/>	Ongoing Training	Offer continuous learning opportunities to ensure skills development and up-to-date industry knowledge.
Ongoing Training and Support	<input type="checkbox"/>	Performance Reviews	Conduct performance evaluations periodically to discuss achievements and areas for improvement.