

New Agent Onboarding Checklist

You will use this to check off as you have completed these tasks.

Agent Name _____

Onboard Date _____

Task	Complete	Date	Initial
	☐		
	☐		
Hollywood Hills Success Guide Rising Stars Playbook	☐		
Apply for Real Estate Boards MLS www.SRAR.com	☐		
Bookmark Office LinkTree on computer & phone (linktr.ee/RISEHollywoodHills)	☐		
Create a list of 100 wedding or graduation guest on a CSV file	☐		
Order Email Signature, Listing & Buyer Presentation marketing@therise.group	☐		
Join Team Instagram Chat Hollywood Hills IG Chat	☐		
Find a script practice/accountability partner Scripts Folder	☐		
Put leads on searches and valuations on Real Scout Real Scout Training			
Add leads to Follow up boss CRM Follow up boss library			
Role play with Shilo A.I. 20 mins a day 5 times a week Shilo Role Play			
Attend all lunch and lends in house lenders Lending Team	☐		
Log into C.A.R. and ZipForms Zip forms Car Forms	☐		
Create RPA & RLA templates on your ZipForms Tutorial	☐		
Learn to search on MLS Video Tutorial	☐		
Create Zillow Premier Agent Profile (work on getting at least a minimum of 3 reviews by friends/family)	☐		
Add about me Bio in Zillow (use A.I.)	☐		
Figure out a target area (farm) title and host an OpenHouse, use OpenHouse request script to text or call	☐		
To prepare for the open house use the this Open House Checklist	☐		

FUB Checklist Training	Completed	Date	Initials
Create a smartlist	☐		
Set Appointment	☐		
Create a deal	☐		
Learn how to move the deal along the process	☐		
Update stages	☐		
Add notes	☐		
Call/Text/Email through FUB	☐		
Access Hollywood Hills Pond	☐		
Claiming from the pond	☐		

Call list	☐		
Import leads	☐		
Script Mastery Checklist – Check Once Internalized			
ALM - live calls (zillow)	☐		
LPMMA -Showings	☐		
When Sowing Home	☐		
ISA Pond	☐		
Working with another agent	☐		
Thinking about it	☐		
Backup Offer	☐		

Sign off once all tasks have been completed.

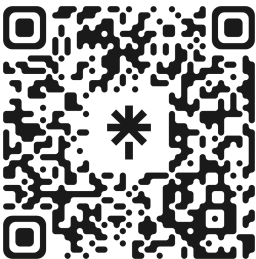
X_____

Date_____

Manager Signature

X_____

Date_____



RISEHH LinkTree