

SCOFIELD GROUP — MASTER ONBOARDING PACKET

Independent Nevada Brokerage · v8 · June 2026

Agent Name: _____ Start Date: _____ License #: _____

PLATFORM SETUP + COURSE CHECKOFF

ITEM	AGENT	AARON
PLATFORMS — All live, headshot loaded on every system below	☐	☐
Gmail — SG email, signature loaded (Exclaimer import in FUB)	☐	☐
Zillow Pro — bio, headshot, license #, on SG team	☐	☐
Follow Up Boss — headshot, Smart Lists visible, signature working	☐	☐
Ylopo — verify branded search URL works; add 1 test client (company-set-up)	☐	☐
SISU — headshot, login working, reporting visible	☐	☐
Zoodealio — headshot, login, integrations URL added, test buyer + test property	☐	☐
Zillow Showcase — headshot, Showcase access confirmed	☐	☐
Dotloop — Loop creation walked through, SG templates pulled	☐	☐
TRAINING — All 5 Courses Complete (multiple-choice quizzes only)	☐	☐
Course 1 — Intro to SG LMS	☐	☐
Course 2 — ICA & Brokerage Policy (Final Exam)	☐	☐
Course 3 — Required Disclosures & Pre-Showing (Final Exam)	☐	☐
Course 4 — Phase 1: System Setup (Final Exam)	☐	☐
Course 5 — Phase 2: Core Training & Go Live (all section Finals + Zoodealio)	☐	☐

Agent: _____ Date: _____ Aaron Lopez: _____ Date: _____

5-DAY COMMITMENT AGREEMENT

Sign before orientation. This is what you're agreeing to over your first week with Scofield Group. Aaron's signature on the End-of-Week sign-off — confirming proficiency — is what clears you to go LIVE on real client deals.

The Commitment

1. In-office or on phones 9 AM – 5 PM, Mon–Fri.
2. 100 outbound dials/day for 5 days. Logged in FUB. Target: 500 total.
3. Work FUB Smart Lists in order daily. Inbox at zero EOD. Tasks current.
4. 5 contracts written live with Aaron across the 5 days — 1/day, page-by-page.
5. CMA / comp reps with Aaron in office during the 5 days.
6. Email brokers@ (with PDF) on every contract BEFORE client signatures + on any deal-specific broker issue.
7. NotebookLM x Slacker is FIRST stop for MLS, NRS, contract, and policy questions.
8. Treat database as a live pipeline — work Zillow Pro signals + FUB Smart Lists daily.
9. Run A.L.M. on every connection call — Appointment (lock), Location (identify), Motivation (uncover).
10. Submit 5 properties/week into Zoodealio. Every closed client + listing lead goes into Ylopo Seller Alerts + Zoodealio.
11. On listings: pitch the full iBuyer menu — Zoodealio (direct), Opendoor, Offerpad — plus traditional listing strategy.
12. Introduce Zillow Showcase BEFORE the listing appointment by email AND in-person at the appointment.
13. Check Project Tracker / Daily Handoff at start + update at end of day.
14. No real-deal contract goes out without Aaron / brokers@ review first — no exceptions.

Sign-Off

By signing below, I commit to the above for the full 5 days. Aaron's signature on the End-of-Week sign-off confirms proficiency and is the trigger to go LIVE on real client deals.

Agent: _____ Date: _____

Aaron Lopez, Managing Broker: _____ Date: _____

Kirby Scofield, Broker & Owner: _____ Date: _____

DAY 1 — TRACKING SHEET

Date: _____ Agent: _____

100 Outbound Dials

Check a box for each dial. Hit all 100 by EOD. Log every dial in FUB.

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10
☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16	☐ 17	☐ 18	☐ 19	☐ 20
☐ 21	☐ 22	☐ 23	☐ 24	☐ 25	☐ 26	☐ 27	☐ 28	☐ 29	☐ 30
☐ 31	☐ 32	☐ 33	☐ 34	☐ 35	☐ 36	☐ 37	☐ 38	☐ 39	☐ 40
☐ 41	☐ 42	☐ 43	☐ 44	☐ 45	☐ 46	☐ 47	☐ 48	☐ 49	☐ 50
☐ 51	☐ 52	☐ 53	☐ 54	☐ 55	☐ 56	☐ 57	☐ 58	☐ 59	☐ 60
☐ 61	☐ 62	☐ 63	☐ 64	☐ 65	☐ 66	☐ 67	☐ 68	☐ 69	☐ 70
☐ 71	☐ 72	☐ 73	☐ 74	☐ 75	☐ 76	☐ 77	☐ 78	☐ 79	☐ 80
☐ 81	☐ 82	☐ 83	☐ 84	☐ 85	☐ 86	☐ 87	☐ 88	☐ 89	☐ 90
☐ 91	☐ 92	☐ 93	☐ 94	☐ 95	☐ 96	☐ 97	☐ 98	☐ 99	☐ 100

Contract Rep with Aaron

Aaron walks through one contract today. Fill in each field together, page-by-page.

Property Address: _____

Purchase Price: \$ _____ EMD: \$ _____

Financing Type: ☐ Conventional ☐ VA ☐ Cash ☐ Other: _____

Down Payment: _____ Loan Amount: \$ _____

Closing Cost Concessions: \$ _____ (Seller-paid: ☐ Yes ☐ No)

Close of Escrow / COE Date: _____ Inspection Period: _____ days

Contingencies (Loan, Appraisal, Sale of Other Property, etc.):

Special Terms / Addenda Used:

Aaron's Notes / Coaching Points:

Day 1 Sign-Off

Agent: _____ Date: _____

Aaron: _____ Date: _____

DAY 2 — TRACKING SHEET

Date: _____ Agent: _____

100 Outbound Dials

Check a box for each dial. Hit all 100 by EOD. Log every dial in FUB.

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10
☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16	☐ 17	☐ 18	☐ 19	☐ 20
☐ 21	☐ 22	☐ 23	☐ 24	☐ 25	☐ 26	☐ 27	☐ 28	☐ 29	☐ 30
☐ 31	☐ 32	☐ 33	☐ 34	☐ 35	☐ 36	☐ 37	☐ 38	☐ 39	☐ 40
☐ 41	☐ 42	☐ 43	☐ 44	☐ 45	☐ 46	☐ 47	☐ 48	☐ 49	☐ 50
☐ 51	☐ 52	☐ 53	☐ 54	☐ 55	☐ 56	☐ 57	☐ 58	☐ 59	☐ 60
☐ 61	☐ 62	☐ 63	☐ 64	☐ 65	☐ 66	☐ 67	☐ 68	☐ 69	☐ 70
☐ 71	☐ 72	☐ 73	☐ 74	☐ 75	☐ 76	☐ 77	☐ 78	☐ 79	☐ 80
☐ 81	☐ 82	☐ 83	☐ 84	☐ 85	☐ 86	☐ 87	☐ 88	☐ 89	☐ 90
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Down Payment: _____ Loan Amount: \$ _____

Closing Cost Concessions: \$ _____ (Seller-paid: ☐ Yes ☐ No)

Close of Escrow / COE Date: _____ Inspection Period: _____ days

Contingencies (Loan, Appraisal, Sale of Other Property, etc.): _____

Special Terms / Addenda Used: _____

Aaron's Notes / Coaching Points: _____

Day 2 Sign-Off

Agent: _____ Date: _____

Aaron: _____ Date: _____

DAY 3 — TRACKING SHEET

Date: _____ Agent: _____

100 Outbound Dials

Check a box for each dial. Hit all 100 by EOD. Log every dial in FUB.

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10
☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16	☐ 17	☐ 18	☐ 19	☐ 20
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☐ 91	☐ 92	☐ 93	☐ 94	☐ 95	☐ 96	☐ 97	☐ 98	☐ 99	☐ 100

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Purchase Price: \$ _____ EMD: \$ _____

Financing Type: ☐ Conventional ☐ VA ☐ Cash ☐ Other: _____

Down Payment: _____ Loan Amount: \$ _____

Closing Cost Concessions: \$ _____ (Seller-paid: ☐ Yes ☐ No)

Close of Escrow / COE Date: _____ Inspection Period: _____ days

Contingencies (Loan, Appraisal, Sale of Other Property, etc.): _____

Special Terms / Addenda Used: _____

Aaron's Notes / Coaching Points: _____

Day 3 Sign-Off

Agent: _____ Date: _____

Aaron: _____ Date: _____

DAY 4 — TRACKING SHEET

Date: _____ Agent: _____

100 Outbound Dials

Check a box for each dial. Hit all 100 by EOD. Log every dial in FUB.

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10
☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16	☐ 17	☐ 18	☐ 19	☐ 20
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☐ 81	☐ 82	☐ 83	☐ 84	☐ 85	☐ 86	☐ 87	☐ 88	☐ 89	☐ 90
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Purchase Price: \$ _____ EMD: \$ _____

Financing Type: ☐ Conventional ☐ VA ☐ Cash ☐ Other: _____

Down Payment: _____ Loan Amount: \$ _____

Closing Cost Concessions: \$ _____ (Seller-paid: ☐ Yes ☐ No)

Close of Escrow / COE Date: _____ Inspection Period: _____ days

Contingencies (Loan, Appraisal, Sale of Other Property, etc.): _____

Special Terms / Addenda Used: _____

Aaron's Notes / Coaching Points: _____

Day 4 Sign-Off

Agent: _____ Date: _____

Aaron: _____ Date: _____

DAY 5 — TRACKING SHEET

Date: _____ Agent: _____

100 Outbound Dials

Check a box for each dial. Hit all 100 by EOD. Log every dial in FUB.

☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10
☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16	☐ 17	☐ 18	☐ 19	☐ 20
☐ 21	☐ 22	☐ 23	☐ 24	☐ 25	☐ 26	☐ 27	☐ 28	☐ 29	☐ 30
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Financing Type: ☐ Conventional ☐ VA ☐ Cash ☐ Other: _____

Down Payment: _____ Loan Amount: \$ _____

Closing Cost Concessions: \$ _____ (Seller-paid: ☐ Yes ☐ No)

Close of Escrow / COE Date: _____ Inspection Period: _____ days

Contingencies (Loan, Appraisal, Sale of Other Property, etc.): _____

Special Terms / Addenda Used: _____

Aaron's Notes / Coaching Points: _____

Day 5 Sign-Off

Agent: _____ Date: _____

Aaron: _____ Date: _____

END-OF-WEEK PROFICIENCY CHECK

Aaron's signature here clears the agent to go LIVE on real client deals.

- ☐ 500 dials logged in FUB across 5 days
- ☐ 5 contracts written page-by-page with Aaron
- ☐ Listing Agreement + Pre-Showing Disclosure walkthroughs complete
- ☐ CMA / comps practice reps complete
- ☐ Zoodealio + iBuyer workflow understood (Zoodealio = SG direct partnership; all three iBuyers used on listings)
- ☐ Brokers@ CC policy understood (every contract before signatures + broker-issue escalations)
- ☐ A.L.M. fluency: Appointment / Location / Motivation
- ☐ Three Pillars internalized: Accountability, Tech, Adaptability

GO-LIVE CLEARANCE

By signing below, Aaron certifies this agent is proficient and approved to go LIVE on real client deals.

Agent: _____ Date: _____

Aaron Lopez, Managing Broker: _____ Date: _____

Kirby Scofield, Broker & Owner: _____ Date: _____

QUICK REFERENCE

Three Pillars	Accountability · Tech · Adaptability
A.L.M.	Appointment (lock) · Location (identify) · Motivation (uncover)
First-stop research	NotebookLM × Slacker — MLS, NRS, contract, policy
Brokers@ CC policy	Every contract before signatures + any broker-issue escalation
iBuyers (listings)	Zoodealio (direct partnership) · Opendoor · Offerpad — pitch all three
Showcase intro	BEFORE the appointment by email AND at the appointment in person
Pipeline daily	Zillow Pro signals + FUB Smart Lists, inbox to zero EOD
No exceptions	No real-deal contract out without Aaron / brokers@ review first