New Agent Checklist -- Getting Started

0/0 completed

✓	Task	Notes	Date Completed
	TOP PRIORITIES		
☐	**Complete your onboarding with the brokerage**	This will include signing paperwork; affiliating your license on the DRE website; and getting your KW credentials	
☐	**Access the Procasa Onboarding Portal and your personal "100 Day Checklist"**	https://www.procasaonboard.com/ Begin working on your tasks for each day as they come up!	

New Agent Checklist -- Getting Started

0/0 completed

✓	Task	Notes	Date Completed

New Agent Checklist -- Ongoing Activities

0/11 completed

✓	Task	Notes	Date Completed
	ON GOING ACTIVITIES (FUNDAMENTALS FOR SUCCESS)		
☐	Complete at least 15 hours of **calendared, intentional** lead generation each week.	Dual Career Agents: At least 30% of your available time each week for real estate should be set aside for intentional lead generation activities.	
☐	Attend PC Boost In Person each week	Check Market Center Calendar for weekly date and time	
☐	Attend at least two lead generation group activities at your office each month	Check Market Center Calendar for dates and times.	
☐	Meet with your Mentor each week	This meeting should be about a half hour and live (in person, via video, or via phone)	
☐	Update your Weekly Progress Tracker prior to PC Boost class every week	Weekly Progress Tracker	
☐	Practice conversations and dialogues with your partner at least 2x per week		
☐	Attend ALL Risk Management Classes with Broker Resource Law Group (BRLG)	Typically 1-1.5 hours long via zoom on one Monday per month starting at noon	
☐	Complete ALL IGNITE classes within 90 days of joining the brokerage	IGNITE is typically offered live online, on recurring basis. See next tab "More about IGNITE" for more info. If you can't attend a lie class or one is not available, here is a link to the recorded classes IGNITE Class Recording Library. For each class, complete the IGNITE Survey. When you complete the whole course, submit your IGNITE Completion Certification	
☐	Attend 1st Step to BOLD	BOLD is typically offered 2-4 times per year. Check your Market Center Calendar for dates and times.	
☐	Attend Family Reunion	Family Reunion is the KW annual sales conference. It takes place in February.	
☐	Read/Listen/View at least 1 real estate book/podcast/video every month		

New Agent Checklist -- Ongoing Activities

0/11 completed

✓	Task	Notes	Date Completed

More about IGNITE

What is IGNITE?

IGNITE is Keller Williams's premier training course for new agents. It consists of 20 two-hour classes on zoom, followed by two hours per day of the "Daily Success System", which is self-guided.

Taking the IGNITE classes is a REQUIRED component of your new agent training and development, and MUST be completed within 3 months of joining the brokerage.

The course takes place live on zoom several times per year. Check the Market Center Calendar for dates and times.

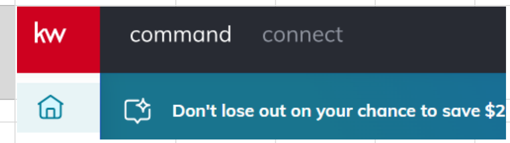
Live real-time attendance to the zoom classes is strongly encouraged. However, you can access older recorded versions or previous classes here: IGNITE Recording Library

After each IGNITE class you watch, please complete the IGNITE CLASS SURVEY

After you have completed all the classes, please complete the IGNITE COMPLETION CERTIFICATE

Handy direct links to important stuff!

Name of Resource	Description	Links			
Agent Portal - East Bay (Oakland; Alameda; Castro Valley; Berkeley)	Brokerage Support (PC Stuff; Tech support; Marketing support; Agent directory; etc)	Link for agents in Oakland/Alameda/Castro Valley/Berkeley			
Agent Portal - Fremont	Brokerage Support (PC Stuff; Tech support; Marketing support; Agent directory; etc)	Link for agents in Fremont			
Agent Portal - Palo Alto	Brokerage Support (PC Stuff; Tech support; Marketing support; Agent directory; etc)	Link for agents in Palo Alto			
Board of Realtors	May be different depending on the office you work at.	https://bayeast.org/	bridgeMLS	https://www.samcar.org/	https://www.silvar.org/
Business Plan	Worksheet containing my Goals; Time Management; 1-3-5; 4-1-1	<Copy link to your customized worksheet here after 1st Business Planning Workshop with your PC>			
DRE (Dept of Real Estate)	All things license-related	https://www.dre.ca.gov/			
DocuSign	Electronic signature signing	https://account.docusign.com/			
Glide	Online wizard for completing disclosure forms	https://app.glide.com/auth/login/			
Homelight (formerly Disclosures.IO)	Seller Disclosures	http://disclosures.io/			
IGNITE Recording Library	All 20 classes of IGNITE ready for you to watch!	Link to IGNITE recordings			
KW Command	Database for managing your business	https://agent.kw.com/login			
KW Connect	Resource library on how to do real estate; including lead generation videos; pdfs and classes	https://agent.kw.com/login	Click on "Connect" on the black bar at the top left corner of the screen to access:		
MLS -- East Bay Agents	Paragon or ConnectMLS	Paragon	ConnectMLS		
MLS -- Peninsula Agents	MLS Listings	MLS Listings Sign On			
New Agent Prerequisite Assignment	Should be completed within 30 days of joining brokerage	New Agent Prerequisite Assignment			
Procasa Onboarding --100 Day Checklist	Your personal day by day checklist to get you up and running!	https://www.procasaonboard.com/			
Weekly Tracker	Complete this form EVERY WEEK	Weekly Tracker			
ZipForms	Legal documents for real estate transactions	https://www.car.org/			



General Business Setup

0/4 completed

✓	Task	Notes	Date Completed
☐	Make sure you have or that you set up a SEPARATE checking account for all your real estate sales activity.	Do not use your personal checking account for business!	
☐	Schedule your quarterly self-employment tax payment on your calendar so you don't forget to pay your taxes on your commissions when they are due! Set aside a portion of EACH commission check so you don't spend the money.	NOTE: Everyone's tax circumstances are different -- check with a CPA to determine the appropriate amount.	
☐	Keep track of ALL your expenses that could be deductions for your new real estate business. You may be able to reduce your annual taxes even if you do not sell many homes in your first year of real estate.	NOTE: Everyone's tax circumstances are different -- check with a CPA to determine your eligible deductions.	
☐	Take a moment to review all of your onboarding paperwork with the brokerage, including limits on commissions you can charge as a listing agent and other brokerage policies. Make sure all your brokerage signing paperwork is filed in a secure place where you can access it when needed.		

General Business Setup

0/4 completed

✓	Task	Notes	Date Completed

Broker Policies & Advisories

1. Until the New Agent Assignment is completed and submitted to the Productivity Coach, new agents are not permitted to show properties or host open houses by themselves, or sign legal documents (offers; listing agreements; buyer representation agreements) without a senior agent co-signer.

2. The brokerage requires that ALL work that requires a real estate license to complete, including showing property or hosting an open house, be compensated via the brokerage. This means that agents may not be paid cash/venmo/check by another agent for work that requires a real estate license to do. ALL such work must be paid through the brokerage, usually through an escrow of the sale of a property.

3. Agents may NOT pay referral fees or offer commission splits to non-agents. This means you cannot offer your friend; your lender; or any other non-agent a finder's fee or share of your commission for them giving you a lead. However, small thank you gifts are okay.

4. Note that compensation and service requirements for hosting open houses is set by the listing agent, and may differ widely for different listing agents. It is your responsibility as the hosting agent to understand and agree in advance to any payment or service terms being offered by the listing agent. If you are NOT satisfied with the terms being offered by the listing agent, you can try to negotiate a more favorable arrangement, or decline the hosting opportunity.

5. Agents at the brokerage are strongly encouraged to host an open houses ONLY for other agents with your office. **For Fremont agents**, that means you can only host open houses for other agents based in the Fremont office. **For Oakland, Alameda, Berkeley, or Castro Valley agents**, that means you can only host open houses for other agents in one of those offices.   **For Palo Alto agents,** that means you can only host open houses for other agents in your office. If you wish to host an open house for an agent outside of your office, please contact your Designated Broker or Team Leader, as the brokerage may allow it subject to special requirements.   Note that even in this case, your E&O Insurance or other business liability insurance you may have (Business owner policies, for example) may not cover any of your real estate activity done for outside brokerages.

6. There are strict rules about how to identify yourself and the brokerage on print and digital media, as well as on the use of fictitious business names. Please see this document for more details.

Broker Policies & Advisories

7. If you choose to create an online portal/website/page using 3rd party services (and not via the brokerage) then that "online presence" must be reviewed and approved by the brokerage for DRE compliance purposes. Reach out to the Broker of Record for your office for that review.

8. Agents who have other profesional designations or roles may not work in those capacities while also representing their real estate clients. For example, someone who is a Property Manager or Architect may not provide property management services or professional architectural advice when representing their Buyer or Seller. Furthermore, they MUST disclose this "dissassociation" to their real estate clients. If this applies to you, please contact your Sales Manager, or BRLG to arrange for the appropriate paperwork.

9. New agents may join a team at any time, but any agent joining a team must have the arrangement approved by the broker or team leader AND any agent joining a team remains in the Productivity Coaching program for the full duration of their remaining obligation to it.

If you have questions about any of these Business Practice Advisories, please contact the Productivity Coach, Designated Broker or Team Leader.