



New Agent Prerequisite Assignment

To ensure our office has the best-trained agents and can properly represent clients, you must complete this assignment within your first 30 days at the brokerage and have it reviewed and approved by your mentor.

Completing this assignment makes you “Open House Certified”!

It also gives you the right to show property to buyers or host an open house without a senior agent present, and to avoid having a required co-signer on contracts.

NOTE: Until this assignment is completed, you may not write an offer OR sign a listing or buyer representation agreement without a senior agent co-signer.

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Summary of Tasks:

For each task below, remember to document your completion of each component on the Achievement Log on the last page.

1. Complete five required classes.
2. Shadow a senior agent (not another agent in the PC program) at an Open House
3. Participate in a Broker's Tour or Caravan
4. Meet with (or attend a class offered by) key brokerage business partners
5. Develop your Value Proposition
6. Visit a property and prepare a fictional Purchase Agreement (offer) for that property
7. Explain the offer to your Mentor as if they were a first-time Buyer of the property
8. Once your Mentor feels you have completed ALL of these tasks adequately:
 - a. Complete the final page of this form
 - b. Sign it
 - c. Have your mentor sign it.
 - d. Email a copy of the last page to PC@kwadvisorseastbay.com

<See next pages for detailed instructions for each task>



Here are the details for each step of the assignment:

1. Complete five required classes.

TWO of these five required classes MUST be attended IN PERSON. Check your market center calendar for the next class date and location. For the other classes, you have the option of attending them in person or via zoom when offered by the market center, or you can access recent recordings which are located on the Agent Portal, under Productivity Coaching/Class Recordings)

a) RPA Overview (Contracts) Class <MUST BE ATTENDED IN PERSON>

Here you will learn how to explain the purchase agreement to your clients. Enter the name of the instructor and the date you attended the class on the Achievement Log on the last page of this form. It is strongly recommended that you attend this class at least two or three times.

b) Disclosures Class <MUST BE ATTENDED IN PERSON>

Here you will learn about all the required transaction disclosures necessary to complete a transaction. Enter the name of the instructor and the date you attended the class on the Achievement Log on the last page of this form.

Want more? → Watch the class on how to review/understand a disclosure package here: https://www.youtube.com/live/3k4mXUyDv_0?si=cPfgceazoTsyTThq

c) Comparative Market Analysis (CMA) Prep Class Here you will learn how to figure out a recommended offer price and be able to present it to your client. Enter the name of the instructor and the date you attended or watched the class on the Achievement Log on the last page of this form.

d) Residential Listing Agreement (RLA) Class Here you will learn how to explain this agreement to your clients. Enter the name of the instructor and the date you attended or watched the class on the Achievement Log on the last page of this form.

e) So You're in Escrow – Now What? ("From Contract to Close") This class walks you through all the basic steps to take from when an offer is accepted until you get paid! Enter the name of the instructor and the date you attended or watched the class on the Achievement Log on the last page of this form.



2. Shadow at least one senior agent at an Open House

- a) Contact your Mentor or any other senior agent who has an open house coming up that they themselves are hosting to arrange this shadowing assignment. Although preferred, the senior agent does not have to be an agent at our office.
- b) Attend the Open House and watch. You are not there to lead generate. Observe how the experienced agent conducts an open house and see how they manage outside signage; engage with visitors; prepare the house; and present marketing materials.
Want more? → Repeat with another agent for a different property
- c) Document your completion of this step on the Achievement Log on the last page of this assignment.

3. Participate in a Broker's Tour or Caravan

A Broker's Tour is a weekly event, usually in the morning, where agents host an "open house" for other agents to come and preview their new listings.

A Caravan is similar to a broker's tour, but instead of the agent's visiting homes they choose from a list, the local Board of Realtors prepares a list of 5-12 houses that are going to be "on the caravan" that day, and agents typically visit them in order.

- a) Use the MLS to identify broker tour or caravan dates/times.
- b) Attend at least one Broker's Tour or Caravan. View at least 10 properties. Ideally, choose a wide variety of neighborhoods and property types.
- c) If necessary, attend a second broker tour OR view additional properties as per MLS viewing instructions to complete this requirement.

Document your completion of this step on the Achievement Log on the last page of this assignment.

4. Meet with (or attend a class offered by) key brokerage business partners

At KW Advisors, we are fortunate to have business relationships with several wonderful service providers. You are not obligated to work with these folks, but learning who they are and what they do is a key part of becoming an effective agent.

- a) Schedule and attend a one-on-one meeting with your office's "in-house" lender from Real Estate Mortgage Advisors (REMA). Learn about how REMA can help your clients and help you grow your business. For KW East Bay, the loan officer is John Schaff. For KW Fremont and KW Palo Alto, the loan officer is Stepheny Chang.
- b) Schedule and attend a one-on-one meeting OR attend a class offered by Steven Klein of Greystone Insurance. Learn about how to discuss home insurance with your buyer and seller clients, and about how to protect yourself with a Business Owners Policy (BOP).
- c) Schedule and attend a one-on-one meeting or attend a class offered by Procasa or with your office's staff person for marketing support. Learn about how to use Procasa marketing services for all of your print and digital media needs.
- d) Document your completion of this step on the Achievement Log on the last page of this assignment.



5. Develop Your Value Proposition

- a) Study and memorize all the different things buyer and seller agents do for their clients
→ Watch video: [Working With Buyers - Features and Benefits](#)
- b) Access the KW resources at this link: [Value²: How to Articulate Your Value to Your Clients](#) on KW Connect and study the recording; slide deck; and reader's guide.
- c) Consider the question from a potential client: **Why should I hire you?**
→ Develop at least one skill, talent, or service that you will highlight as an answer to this question. The more this answer conveys a unique service offering other agents don't or can't offer, the better you can differentiate yourself with potential clients.
- d) Practice sharing your value proposition with your conversation/dialogue partner; Mentor; PC and others until you can convey it clearly and confidently in 60 seconds or less
- e) Document your completion of this step on the Achievement Log on the last page of this assignment.

6. Prepare a Fictional Purchase Agreement

- a) Select a property (from our office) for which you want to write your fictional offer
- b) Preview the property in person via Broker's Tour, Open House or via a private showing that you arrange as per the MLS showing instructions
NOTE: This is a REQUIRED STEP. Do not write your fictional purchase agreement for a property if you have not viewed it in person and completed the other steps in this section!!
- c) While you are at the property, complete an Agent Visual Inspection and document your observations using the ZipForms Form "Agent Visual Inspection Disclosure". Please see the Agent Portal Toolkit link: "AVID: Tips for completing the Agent Visual Inspection Disclosure" for guidance.
→ Review your AVID with your Mentor
- d) Request & Review the disclosures for the property you selected in the previous step by requesting them as per the instructions in the MLS.

Discuss the disclosure package with your mentor.

- a. What mandatory disclosures might be missing?
- b. What is the relevant information you discovered?
- c. What concerns would you want to discuss with your buyer?
- d. What other paperwork, besides the contract itself, belongs with the offer?



e) Reach out to the Listing Agent with any questions you have about the property or the sale. (Be sure to tell them that this is not for a real client!)

What questions will you ask the listing agent? (Doing your due diligence is critical to addressing the sellers' wants/needs)

- a. What is the seller looking for in an offer?
- b. What's important to them?
- c. How much interest has there been in the property?
- d. Do they need a rent back?

f) Complete a CMA for the property to understand comparable sales.

Discuss your CMA with your mentor.

- a. What search criteria did you use?
- b. What properties did you consider the best comps?
- c. What properties did you reject as being less useful as comps?
- d. How did you arrive at the recommended purchase price range?

g) Complete a Residential Purchase Agreement form (RPA) via ZipForms. **Your mentor should be specified as the buyer in the contract.**

h) Use the ZipForms digital signing service (via the e-sign link) to appropriately tag all the fields and send the contract out for digital signatures. **Verify all the tags for signatures/dates/etc are done correctly.**

- i) Alert your mentor that you are sending them the fake contract for their signature.
- j) Present the complete offer package to your mentor **as if they were a first-time buyer** for review, feedback, and acceptance. Your mentor may choose to review it with you PRIOR to (or instead of) completing the DocuSign themselves.
- k) Document your completion of this step on the Achievement Log on the last page of this assignment.

Statement of Completion – New Agent Prerequisite Assignment (pg1)

The Assignment is NOT complete until this Statement is completed and emailed to the Productivity Coach!

1. Please enter the information requested on page 1
2. Initial and Sign where indicated on both pages
3. Have your mentor sign and initial where indicated on both pages
4. Send the completed form to your Productivity Coach at: pc@kwadvisorseastbay.com

Attended the RPA/Contracts Class:

Date: _____ Instructor: _____

Attended Disclosures Class:

Date: _____ Instructor: _____

Attended CMA Prep Class:

Date: _____ Instructor: _____

Attended Residential Listing Agreement (RLA) Class:

Date: _____ Instructor: _____

Attended "So You're in Escrow - Now What" Class:

Date: _____ Instructor: _____

Shadowed a senior agent at their open house:

Date: _____ Senior Agent Name: _____ Address of house: _____

Participated in a Broker's Tour or Caravan:

Date: _____ Tour Group (city): _____

Date: _____ Tour Group (city): _____

Met with Loan Officer/Lender Partner:

Date: _____ Loan Officer Name: _____ Location: _____

Met with Insurance Agent at Greystone Insurance or attended a class offered by Greystone:

Date: _____ Location: _____

Met with Procas a representative or attended a class offered by Procas a:

Date: _____ Location: _____

Developed my Value Proposition and practiced it with my Mentor

Date: _____



Statement of Completion of New Agent Prerequisite Assignment (pg2)

Completed Fictional Purchase Agreement

Date: _____

Your Name: _____

<Print Name>

MENTEE ATTESTATION: I have completed ALL of the steps of the New Agent Prerequisite Assignment in a competent manner and reviewed it with my Mentor. I am now able to explain the purchase agreement contract and prepare a professional and acceptable offer for a real client.

Mentee (signature) Date

MENTOR ATTESTATION: The Mentee has completed ALL of the steps of the New Agent Prerequisite Assignment in a competent manner and reviewed it with me. The Mentee is now able to explain the purchase agreement contract and prepare a professional and acceptable offer for a real client.

Mentor (signature) Date