

# New Agent Onboarding: Week 1 + 30/60/90

Everything to set up in week one, then the milestones that build a pipeline in your first 90 days.

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## Week 1: license & compliance

- Confirm license transfer with your state commission
- Sign the independent contractor agreement (review fees first)
- Enroll in or confirm E&O insurance from Day 1
- Complete fair housing and agency disclosure training
- Review the brokerage advertising compliance checklist

## Week 1: systems

- Set up transaction management software (dotloop, Skyslope...)
- Confirm MLS access and lockbox key activation
- Complete your agent profile in the brokerage back office
- Choose and set up a CRM
- Enter your first 100 contacts from your personal network

## Week 1: public presence

- Submit Google Business Profile for verification on Day 1
- Create Instagram Business + Facebook Business Page
- Book a professional headshot session
- Write your 150-200 word bio with license number and market area
- Order business cards
- Set up your email signature: phone, license number, brokerage

## Days 1-30: foundation

- 5-10 sphere calls per day: introduce, ask, offer help
- Attend every brokerage training session
- Shadow an experienced agent on 2-3 showings
- Post 3-4x per week before you have a listing

## Days 31-60: pipeline

- Host at least 2 open houses (ask your broker to sponsor you)
- Build your listing video workflow: 9:16, 1:1, 16:9 from photos
- Run every video against the compliance checklist before posting

## Days 61-90: first close

- Hold at least one active buyer conversation by Day 60
- Follow up every open-house lead within 24 hours
- After every showing and closing: one referral ask, every time

## Milestone targets by day 30 / 60 / 90

- CRM contacts entered: 100 / 200 / 300
- Social posts published: 15 / 45 / 75
- Open houses hosted: 1 / 3 / 5
- Sphere calls completed: 50 / 100 / 150
- Approved property videos posted: 1 / 5 / 10
- Referral asks sent: 10 / 25 / 50