

NEW AGENT CHECKLIST

Legal & Licensing (Weeks 1 & 2)

- Submit real estate license application
- Complete background check requirements
- Obtain errors and omissions insurance
- Register with state real estate commission
- Join local MLS system
- Complete brokerage onboarding process
- Sign independent contractor agreement

Lead Generation Prep (Weeks 7 & 8)

- Create sphere of influence database
- Send announcement to family and friends
- Create social media content calendar
- Set up lead capture system
- Create buyer consultation presentation
- Create seller consultation presentation
- Develop elevator pitch
- Create follow-up email sequences

Technology & Systems (Weeks 3 & 4)

- Install MLS mobile app
- Install showing management app
- Set up cloud transaction management system
- Configure digital signature software
- Set up CRM system
- Create email marketing account

Networking & Relationships

- Join local real estate association
- Join chamber of commerce
- Attend first networking event
- Connect with local mortgage brokers
- Meet with home inspectors
- Connect with real estate attorneys
- Meet with title companies
- Connect with contractors and handymen

Marketing & Branding (Weeks 5 & 6)

- Schedule professional headshot session
- Create business logo and branding materials
- Design and order business cards
- Create email signature with contact info
- Set up Google My Business profile
- Create LinkedIn business profile
- Set up Facebook page
- Create Instagram account
- Design and order yard signs and marketing materials

Common Mistakes to Avoid

- Rushing brokerage selection
- Delaying professional photography
- Neglecting to build sphere of influence
- Procrastinating on lead generation
- Spending too much on marketing too soon
- Not tracking expenses properly
- Not establishing professional relationships
- Skipping continuing education
- Ignoring legal compliance requirements
- Avoiding networking opportunities

Congratulations! You're ready to scale your real estate business!