Onboarding New Agents

Starting strong is everything. This section outlines the step-by-step onboarding process for new agents joining The Team. From welcome meetings to system access, branding guidelines, mentorship pairing, and early goal setting, we ensure every new agent feels supported, aligned with our team culture, and equipped for success. Our onboarding journey is designed to build confidence, connection, and competence—right from day one.

- Onboarding Standard Procedure

Onboarding Standard Procedure

Purpose

To provide a structured and welcoming onboarding experience that sets every new agent up for long-term success, integrates them into our team culture, and accelerates their productivity.

Overview

Successful onboarding improves performance, confidence, and retention. Our “Red Carpet” onboarding experience ensures every agent feels valued, prepared, and supported right from day one.

Step 1: Prepare Before Day One

Technology and Tools Setup (*Century 21 Admin will Help organize)

- Email address and email signature
- Voicemail greeting

- Access to all required platforms:
  - Google Workspace
  - CRM
  - BrokerBay
  - Back At You Media
  - Spotlight, Testimonial Tree, etc.
  - Remarketer
- Business cards ordered and branded materials ready

Workspace Setup (if applicable)

- Desk or office station ready
- Name tag or signage updated
- Welcome package organized

Step 2: Prepare a Branded Onboarding Package

Includes the following materials:

- The Team Mission, Vision, and Core Values
- Marketing materials and presentation samples
- Team value proposition
- Client and internal testimonials
- Team contact list with bios and photos
- Communication rhythm and team meeting schedule
- Signed team agreement, policies, and role expectations
- Team organizational chart

Step 3: Day One – Welcome Experience

First Day Agenda:

- Welcome note and branded gift (e.g., flowers or a curated basket)
- Welcome announcement to the team
- Office tour and introductions
- One-on-one meeting with Anna or designated team leader
- Walkthrough of the Team Playbook and how to use BookStack

Step 4: Structured Training Schedule

Week 1

- Shadow experienced agents on appointments (e.g., listing, showing, offer presentation)
- CRM and tool orientation
- Review SOPs related to listings, buyers, marketing, and compliance

Week 2–4

- Attend scheduled team meetings and workshops
- Join group training sessions (topics include lead conversion, prospecting, systems)
- Deep dive into tools: BrokerBay, Google Suite, Spotlight, XSEL, etc.
- One-on-one mentoring/coaching sessions scheduled weekly
- Participate in a business planning and goal-setting workshop

End of Month 1 Milestones

- Business plan and personal goal tracker completed
- Full access and usage of all team systems
- Integration into daily workflows and communication channels

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Files and Resources

- Welcome Email Template
- New Agent Onboarding Checklist
- 30-60-90 Day Action Plan
- Tech Access and Login Guide

- Weekly Meeting Calendar
- Branding and Templates Kit
- CRM Quick Reference Guide