

# ONBOARDING CHECKLIST

## INTRODUCTION

Welcome to eXp Realty! Simone and her team is here to help you integrate from your previous company to eXp in the smoothest possible way. This checklist is designed to work in tandem with the website [theVIProom.ca](http://theVIProom.ca) where you will find links to details on each of these checklist items and a Library of resources for our Agents!

## BEFORE JOINING EXP

- Complete Join Application** – this can be found at [join.exprealty.com](http://join.exprealty.com)
- Interview with Broker/Manager** – this is a phone call
- Receive, Review, **Sign ICA** (Independent Contractor Agreement) via DocuSign (check junk mail). This is where you will note your Sponsor + Join Date
- Transfer License** – on the date noted on your ICA. In AB this is done through MyRECA

## ONCE JOINED

- Verify Your Email** – activate your eXp email address and confirm your email forwarding address.
- Activate your Passport** – this is your “single-sign-on” or one password you will use for nearly everything with eXp. An Onboarding Specialist should be in contact with you to help with this.
- Log in to [www.expenterprise.com](http://www.expenterprise.com)** and Bookmark this page – this one site is your “back office” and will take you to every other site within eXp.
- Download and Install eXp World** – this is our virtual campus.
- Setup your Workplace Profile** – this is our main communication tool (this is by Facebook for Business), create your profile just like you would for Facebook.
- \*Register for FINTRAC Certification** – all eXp agents in Canada must participate in FINTRAC Certification – training is the 2<sup>nd</sup> and 4<sup>th</sup> Wednesday of each month.
- \*Attend Canadian Orientation** – in eXp World. Part I is Monday 11am or Wednesday 9am MST and Part II is Tue/Thur at 12pm MST
- \*Register for DNCL Training** – in Canada it is important to have compliance with the do not call list if you make outbound calls

- SkySlope Training** – this is your transaction management system, attend training to learn how to use this.
- Set up your kvCORE Website** – it will take a few days to have this set up so you should register asap for this. Once setup, ensure your profile and bio are accurate. Need help? Email [support@simonerousseau.com](mailto:support@simonerousseau.com)
- kvCORE Semi-Custom Design** (optional) – you can have your personal/team website customized.
- Attend Broker Sales Meeting** – see the schedule for when your Provincial or State Broker Meeting is being held and attend in eXp World.
- Learn about Deposits** – understand how to accept or submit deposits to eXp.
- Health Benefits or Health Care** – Inquire about Health Benefits (Canada) or Agent Health Care (US)
- Contact Info** – learn who your Broker(s) and Conveyancing/Admin Staff are and how to reach them should you need to
- Review eXp Company Policies -

## BUSINESS AND MARKETING

- Brand/Logo** – decide on what brand/logo and/or team name you wish to use for your business.
- Signage and Marketing Design** – have a designer create your designs for business cards, lawn signs, open house / just listed, letterhead, notepads, listing package, etc.
- Print Signage** – have your signs and marketing materials printed locally
- Business Cards** – eXp can provide some temporary business cards if needed or have your own design printed locally
- Transfer Your Listings** – see the article in [The Library](#) for more info
- Conditional Sales** – ensure any conditional sales are wrapped up or transferred to another agent before moving
- Update Social Media Profiles** – Facebook, Instagram, LinkedIn, Zillow, Google, and any others
- Update Email Signature** – on all devices and computers (phone, tablet, computers)

## AGENT ATTRACTION

- Visit Your Attraction Link – <https://firstlast.exp Realty.careers/>
- Attend Simone’s Agent Attraction Bootcamp (see theVIProom.ca)
- Join the Attraction Facebook Page – “Agent Magnetism – eXpect MORE”
- Download the 4-Step Attraction Method from the Facebook Group

- ❑ Attend Agent Attraction Zoom Hangout
- ❑ Save Links to eXp Explained Videos
  - Pablo's eXp Explained (20 min)
  - Brent Gove – the Model Explained (35 min)
- ❑ Review the Agent Attraction Code – stay compliant
- ❑ \*Go to and Review attraction.exprealty.ca – the Canadian Attraction Website

## AGENT PRODUCTION TRAINING

- ❑ **Visit Production Training Calendar** – we have training from leaders in the Upgrade Life Group (agents you are directly connected to in eXp)
- ❑ **eXp University Training** – see what eXp has to offer... from the Agent Bootcamp for the basics all the way to ICON training
- ❑ **Agent Upgrade Training** – hosted by Pablo Galvez
  - [www.agentupgrade.ca](http://www.agentupgrade.ca) (register for updates!)
  - [www.agentupgrade.LIVE](https://www.facebook.com/agentupgrade) (links to Facebook page)
  - [YouTube Channel](#)
- ❑ **2-Comma Real Estate** – hosted by John Tsai
  - <https://www.facebook.com/groups/2commaRE>

\*Indicates Canadian specific content