

# Onboarding Schedule

Mid-Career 



## Week 1

- Housekeeping - Keys
- Develop SOI list - 500 Names
- WHY Main Place Real Estate
- Meet the team
- Meet with Chris
  - Goal setting, ideal calendar, strengths & weaknesses
- System Training 1-3
  - Google & Gmail
  - Intro to Boomtown
  - Realist, GIS map, & Township assessor
- Marketing & Business Development
  - Schedule photos, order business cards & postcards, modify bio, websites, etc.
  - Put together SOI list
- System Training 4
  - Boomtown: lead central, lead profiles, drips, e-alerts, activity, texts, emails, log calls, notes
  - Intro to Sisu: dashboard & goals, transaction & task management

## Week 2

- Marketing
  - Postcards, press releases, social media
- Business Development
  - Zillow: Set up & training videos
  - Opicity: Set up & training videos
  - Input SOI into Boomtown
- System Training 5-6
  - Sisu: trigger from Boomtown, form, tasks, documents (buyers and sellers)
- Office workflow:
  - Transaction Desk, Transaction coordinators

## Week 3

- Lead Conversion
  - Buyer qualifying conversation (roleplay)
  - Homeowner presentations (roleplay)
- Seller Client Training 1
  - CMAs
  - Listing appts (shadow)

## Week 4

- Lead Conversion
  - Seller qualifying conversations (roleplay)
- Seller Client Training 2
  - Listing agreements & disclosures (shadow & roleplay)
  - Matterport with photographer (shadow)

## Week 5

- Lead Conversion
  - Listing presentation (shadow & roleplay)
- Seller Client Training 3
  - Present offers (shadow & roleplay)
  - Negotiations (shadow & roleplay)

## Week 6

- Seller Client Training 4
  - Present offers (roleplay)
  - Negotiations (roleplay)
  - Listing appts (supervision)
- Lead Conversion
  - Referral calls (roleplay)

