

BROKERAGE

AGENT ONBOARDING



MAXTECH
powered by kvCORE
PLATFORM

MONTH 1 (WEEKLY CLASSES)

WEEK 1 PRE LAUNCH

- ☐ kvCORE Lead Import Template - USA Format
- ☐ US Lead Import File - Video (8 min.)
- ☐ Supported Import Fields (4 min.)
- ☐ Why Do I Need Email Addresses For My Contacts in kvCORE? (1 min.)
- ☐ How to Send a Welcome Email After Importing Your Contacts (3 min.)

Organizing Contacts Once Broker has IDX signed and has made the call for setting up DNS - site is about to go live - Make sure agents have the kvCORE CSV template for their database. Have them organize and get ready for import. Click [Here](#) for template & Videos Watch videos

WEEK 2 AGENT LAUNCH WEEK



- ☐ "Setting Up kvCORE" (15 minutes, 5 videos)
- ☐ "Understanding Contact Records & the Client Journey" (6 min video)
- ☐ "Getting Familiar with your website and Listings" (17 minutes, 4 videos)
- ☐ "Fueling Your Pipeline" (18 minutes, 4 videos)
- ☐ "Closing Remarks" (1 minute video)

Once agents have been invited to the system. (Allow 2 hours for this class) 1 hr in videos, 1 hr for importing contacts (If they came to week 1, importing should be easy) Watch the onboarding session together 1 hour in videos - then import their database.

WATCH ONBOARDING VIDEOS FROM AGENT DASHBOARD



WEEK 3 - SMART NUMBER'S

- ☐ Smart Number Overview (2 min.)
- ☐ Lead Capturing Smart Number Functionality - Video (4 min.) 
- ☐ Smart Number Strategies to Get Accurate Contact Info - Video (58 min.) 

If agents are doing great - add in building squeeze pages or adding text codes. Watch the tutorial on what the Smart Number is and how they work. Agents get pretty confused on how the Smart Numbers actually work so this is a good start into the system for building text codes, etc.

WEEK 4 GENERAL OVERVIEW

- ☐ Have they downloaded their CRM App?
- ☐ Have they downloaded their branded website app? Do they have this
- ☐ linked to their email signature?
- ☐ What are the agents' wins, struggles


General questions. Brokers - Look at your dashboard reports to find agents who have done activities. Let them be your agent champions for these sessions. Questions for your agents; Find answers together and they will see all of the great tutorials available to them.

Visit help.insiderealestate.com for tutorials & articles



MONTH 2 (BI-MONTHLY CLASSES)

MONTH 2 CLASS 1 - CREATING TEXT CODES & SQUEEZE PAGES FOR LEAD GENERATION

- ☐ How Do Text Codes Work? (1 min.)
- ☐ How to Set Up a Default Text Code (2 min.)
- ☐ How to Set Up Custom Text Codes (3 min.)
- ☐ Adding Conversation Starting Questions to Call Capture Codes (3 min.) 

Wins/Struggles with the system in general before going into class
Have any of your agents created or used text codes / squeeze pages?
What were the results?
Articles / Video for Text Codes to use for class - After reviewing, have agents create a text code for a listing and use on their property flyer or sign rider.

MONTH 2 CLASS 2 - BUILDING SQUEEZE PAGES

- ☐ New listings for one of their farming areas
- ☐ Property Page for one of their listings
- ☐ Seller squeeze for City they market
- ☐ Market report for a city they serve.

Articles / Videos for building Squeeze Pages - [Click Here](#)

Review articles above and have agents build 3 squeeze pages and post to social.
[Link to squeeze page Tutorials](#)

MONTH 3 MONTHLY ONE MASTERMIND CLASSES

If you did the agent competition, this could be the class where the winners were announced.

- ☐ Have they downloaded their CRM App?
- ☐ Have they downloaded their branded website app? Do they have this
- ☐ linked to their email signature?
- ☐ What are the agents' wins, struggles

General / Overall Wins, struggles and allow agents to help each other with what is working for them! Find answers together and they will see all of the great tutorials available to them.





AGENT ACCOUNTABILITY / COMPETITION IDEAS

Bring the fun to your office to help build excitement and adoption of kvCORE to your Agents.

Their Success is Your Success!

Agents receive points for everything they do in the system, have winners receive something special (even if silly) - Could be Lunch with the Broker or maybe something from the kvCORE marketplace.

ACCOUNTABILITY:

(Tip - If the agent comes to the class for onboarding videos, have them bring their laptop to play videos & just mute their computer) ;-)

- ☐ Agents arrive to classes on time - 2 points per class
- ☐ Agents complete Agent Quick Start Guide - 100% - 10 bonus points
- ☐ Agents receive 2 points for each completed section of onboarding videos (6 sections total)
- ☐ Agents do homework assignments for each class - 2 points
- ☐ Agents do activities from each section above - 2 points

SYSTEM ACTIVITIES:

- ☐ Agent send 5 texts per week - 2 points
- ☐ Agent adds call notes for 5 people - 2 points
- ☐ Agent add 5 tasks per week - 2 points
- ☐ Agent downloaded CRM App - 2 points
- ☐ Agent downloaded branded mobile search app - 2 points
- ☐ Agent adds at least 5 Testimonials to their site - 2 Points

