BROKERAGE
AGENT ONBOARDING

RE/MAX

MAXTECH
powered by **kv CORE PLATFORM**

MONTH 1 (WEEKLY CLASSES)

WEEK 1 LAUNCH PARTY

Getting Started, review of your dashboard, your profile, settings and resources. Review of the Playbooks for Listing Promotion and Database ideas for importing

TIP: You can watch the "How it Works" Recorded Webinar. Just note that their profile info is pulling from MAXcenter. They should add their signature & email From inside their profile.

Homework: Complete their Agent Launch checklist (Blue Pop Up bubbles).

Watch our Let's Get Started Video 1hr

WEEK 2 CRM ORGANIZATION

Client's Journey - Smart #'s Text codes & Smart Campaigns Basic review

Organizing your Database, using filters to help you get organized.

Homework for week 2-4: Complete their Agent Quick Start Guide. (Or do the Agent Quick Start Guide together)! If this will be homework, maybe let the agents know that only agents who COMPLETE the Guide will be added to the office Lead Routing for Leads after week 4!

AAAWW YEAH!

WEEK 3 - WEBSITE SETTINGS

Website Settings & Customization with widgets & more!

Homework - Remind agents that their Agent Quick Start Guide Certificate is due this week in order to be added to Office Lead Rotation!

Watch Our Setting Up Your Website Video 1hr

WEEK 4 MARKETING

Marketing has never been so easy! Check out Design Center, COREsocial, and your Listing Automation!

Homework or do in class: Create at list one kit including flyers & social for their listing packet.

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MONTH 2 (BI-WEEKLY CLASSES)

WEEK 5 COREpresent

COREpresent & Organizing Database for past clients

Set up your Presentations then review using filters in CRM to get your past Clients Valuation Address in their profile to begin sending CMA's!

Homework - Get your CMA customized and send a CMA a Day. Once agents send a CMA, add hashtag CMAaDAY and make it a competition for the next month - the top agent for sending a CMA receives X prize)

WEEK 6 BROKER AGENT REVIEW   NO AGENT CLASS THIS WEEK

Brokers - Use the Business Analytics in your Dashboard to see which agents need to be reached out to for help in getting started, which agents are using the system for their input, testimonials, feedback, etc. The Business Analytics is your way to reach out to agents that need help as well as your Champions! Maybe take the top 3 Agents USING the system to lunch to get feedback, their wins, etc.

WEEK 7 - AGENT MASTERMIND

Remind agents they have two more weeks for the CMAadDAY challenge. Review WINS, Struggles, etc. Have the top agents using the system help with tips on what they are doing that is working for them!

Homework - Keep up the CMAaDAY Challenge!

WEEK 9 OPEN DISCUSSION

Announce Winner(s) for the CMAaDAY Challenge as well as overall Competition if you did one.

Maybe take the top 3 Agents to Lunch!

Getting feedback, testimonials and having open discussions will be a HUGE part of adoption for your agents!

Do NOT be discouraged if you do not know the answers, learning together with your agents and being their to support them will be HUGE!

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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 Imports their Contacts - 5 points
- [ ] 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 sends 5 CMA's - 2 points
- [ ] Agent adds at least 5 Testimonials to their site - 2 Points

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