



Onboarding

CHECK LIST

Pink items indicate homework given during call

- ☐ **SUBMIT YOUR SETUP FORM**
- ☐ **COMPLETE YOUR PERSONALIZATION FORM**
- ☐ **SUBMIT YOUR GOALS FORM**
- ☐ **BOOK YOUR LAUNCH CALL**
- ☐ **UPLOAD YOUR CONTACTS**
- ☐ **WATCH THE MOFIR VIDEO & SETUP CALL**
- ☐ REVIEW YOUR CONTACTS FOR MISSING INFO
- ☐ INTEGRATE YOUR CALENDAR INTO AGENTMOVES
- ☐ UPDATE YOUR PIPELINE IN AGENTMOVES
- ☐ WATCH 'FOUNDATIONS' VIDEOS IN TRAINING PORTAL
- ☐ **WATCH 'SHARE' VIDEO AND BOOK CALL**
- ☐ APPROVE YOUR LEAD MAGNETS + MONTHLY ASSETS
- ☐ **WATCH 'ENGAGE' VIDEO & SETUP CALL**
- ☐ REVIEW YOUR 'MOFIR TIME' EMAIL & NURTURES
- ☐ **WATCH 'ATTRACT' VIDEO & SETUP CALL**
- ☐ REVIEW, COMMENT & APPROVE YOUR FUNNELS
- ☐ **WATCH 'CONVERT' VIDEO & SETUP CALL**
- ☐ MAKE EDITS TO YOUR FOLLOW-UP LEAVE BEHIND