



First 30 Days:

WEEK ONE - REAL ESTATE ACCOUNT TRANSFERS/ONBOARDING

NEW AGENT

- ☐ Join the Charleston Trident Association of Realtors (CTAR)/South Carolina Realtors(SCR)/National Association of REALTOR®(NAR) <https://charlestonrealtors.com/join-as-a-realtor/> (\$535)
- ☐ Sign up for CHS MLS and complete the required MLS Training (\$130 Qtrly)
<https://www.easy-lms.com/chs-regional-mls-new-member-training/course-69364?PHPSESSID=new>
- ☐ Complete SentiLock Class to obtain SentiKey app access (\$75)
<https://ace.easy-lms.com/en/sentrilock-course/course-13186?PHPSESSID=new>

TRANSFERRING AGENT

- ☐ Transfer CHS MLS <https://charlestonrealtors.wufoo.com/forms/mls-transfer-form/>
- ☐ Update your NAR Realtor account <https://www.nar.realtor/>
- ☐ Update your SCR Realtor account <https://screaltors.org/>
- ☐ Update your Realtor.Com <https://www.realtor.com/marketing/agent-profile/>

ALL AGENTS

- ☐ Access company email firstname@clfhomesolutions.com (Check your current email for access)
- ☐ Provide your professional photo & short bio to the CLF Home Solutions Admin
- ☐ Complete onboarding documents. You will receive an email with instructions.
- ☐ Submit Driver's License and Car Insurance ID to CLF Admin
- ☐ Confirm access to Skyslope Books
- ☐ Business cards and name tags provided by the company

WEEK TWO - SYSTEMS ACCESS & TRAINING 1

- ☐ Confirm access and complete Kvcare Training:
<https://learn.insiderealestate.com/courses/boldtrailsqs>
 - ☐ Send Completed Certificate to admin@clfhomesolutions.com
- ☐ Attend the office orientation with Chenné - dates will be announced
- ☐ Attend C.L.F. Home Solutions training
 - ☐ 1st Thursdays – Company Training (6 PM In-person)
 - ☐ 2nd Tuesdays - Success Coaching & Accountability (6 PM - ZOOM)
 - ☐ 3rd Tuesdays - Success Skills Training (6 PM In-Person)
 - ☐ 4th Tuesday - Lunch & Learn at Noon (In-Person)



WEEK THREE - SYSTEMS ACCESS & TRAINING 2

- ☐ Confirm access and complete Skyslope Training:
<https://support.skyslope.com/hc/en-us/articles/18018824799771-SkySlope-Training-for-Agents>
- ☐ Send Completed Certificate to admin@clfhomesolutions.com
- ☐ Bookmark the <https://resource.clfhomesolutions.com/#heading-ZEmkP4f8IM>

WEEK FOUR - SUCCESS SETUP

- ☐ Order marketing material - [Yard sign template](#)
- ☐ Create a free basic Canva account (As you progress you may want to consider upgrading to the professional account) <https://www.canva.com/>
- ☐ Complete the [Mastering Systems to Elevate Your Real Estate Game](#) document

First 60 Days:

- ☐ Business Name
 - ☐ LLC
 - ☐ EIN
 - ☐ Business Bank Account
 - ☐ Suggestion - First Citizens Bank (POC: Gina Owsley, 843-875-8554)
- ☐ Read and be able to present/discuss the following:
 - ☐ Disclosure of Real Estate Brokerage Relationships (Buyer) 110 - SCAR
 - ☐ Exclusive Right to Buy Buyer Agency Contract 130 - SCAR
 - ☐ Earnest Money Disclosure 620 - SCAR
 - ☐ Flood Insurance Disclosure 233 - SCAR
 - ☐ Wire Fraud Warning (Buyer) 610 - SCAR
- ☐ Schedule 5 Showing (2 Go & Show, 2 New Construction, 1 Your Choice)
 - ☐ Go & Show Property Address: _____
 - ☐ Go & Show Property Address: _____
 - ☐ New Construction Community: _____
 - ☐ New Construction Community: _____
 - ☐ Your Selection: _____
- ☐ Host 1 Open House
- ☐ Host a Home Buyer Workshop or Participate in an Event to market your business
- ☐ Conduct a Buyer consultation



- ☐ Conduct a Listing consultation
- ☐ Meet Your Accountability Partner: _____
- ☐ Add names to your database; start with names in your cell phone (min. 10 daily = 50 wkly)
- ☐ Lead Generation daily with a minimum of 10 contacts/day
- ☐ Utilize Kvcare daily or personal CRM

First 90 Days:

- ☐ Have a minimum of 2 Binding Agency Agreements (Buyer Agency Agreement or Listing Agency Agreement)
- ☐ Continue to use Kvcare (or personal) CRM daily
- ☐ Implement your Farming Plan

***Team Guidance for New Agents**

All licensed agents on teams who have not sold 3 transactions within 12 months must comply with mandatory training requirements.

AGENT SIGNATURE / DATE

BROKER IN CHARGE SIGNATURE / DATE

| GOAL COMPLETED | DATE COMPLETED | MENTOR OR BIC |
|-----------------------|----------------|---------------|
| 30-DAY GOAL COMPLETED | | |
| 60-DAY GOAL COMPLETED | | |
| 90-DAY GOAL COMPLETED | | |