



## **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 SentriLock Class to obtain SentriKey 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](mailto: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 Kvcore Training:  
<https://learn.insiderealestate.com/courses/boldtrailags>
  - Send Completed Certificate to [admin@clfhomesolutions.com](mailto:admin@clfhomesolutions.com)
- Attend the office orientation with Chenné - dates will be announced
- Attend C.L.F. Home Solutions training
  - 1<sup>st</sup> 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 Kvcore 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 Kvcore (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.

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AGENT SIGNATURE / DATE

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BROKER IN CHARGE SIGNATURE / DATE

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