

Week 1

	Task	Assigned To	Date Completed
Day 1	Complete First Day Welcome Checklist		
	Complete Employee Information Card		
Day 2	Set up Payroll / Direct Deposit		
	Assign keys to office		
	Assign mailbox		
	Setup Business Phone Extension		
	Record Voice Mail Greeting		
Day 3	Update Employee Directory and Send Out Update Email to Team		
	Prepare & Deliver W4 & I9 Form		
Day 4	Receive W4 & I9 Form from Employee		
	Introduce to ALL Team Members		
	Order Business Cards		
	Verify Set up Voice Mail		
	Set up Email Account		
	Set up Email Signature		
	Set up Electronic Stationery		
	Add to Employee to Appropriate Team Internal Email Lists		
Day 5	Overview of CRM		
	Overview of MLS System		
	Overview of In-office Phone System		
	Overview of Any Other Office Software Used		
	Practice Adding/Updating 10 Practice CRM Entries		
	Review Vendor List		
	Review Team Mission Statement		
	Take Ownership Office Supplies		

Week 2

Task	Assigned To	Date Completed
Review Pre-list Package if Applicable		
Explain Daily Activity Record		
Review Buyer Agent Worksheet and Report		
Practice Filling out Buyer Information Sheet		
Practice filling out Seller Information Sheet		
Review Buyer Presentation + Process		
Review Listing Presentation + Process		
Review Lead Management A-B-C Buyers and Sellers		
Review Buyer Lead Sheet		
Review Seller Lead Sheet		
Review Ideal Weekly Schedule		
Read through Support Staff Scripts		

Week 3

Task	Assigned To	Date Completed
Review and Practice Support Staff Scripts		
Sit in on Several Phone Calls to See Preferred Phone Etiquette		
Set up Role Playing Sessions for Answering the Phone and Talking w/ Potential Buyers and Sellers		
Sit through Initial Buyer Consultation		
Draft Introduction Letter to Support Staff's past clients or sphere		
Sit in on One Coaching Call		
Have New Hire Create Daily CRM Task List Based on First Exposure (This list will evolve as they learn more)		
Review 3 Submitted Contracts (if applicable)		
Review Previous Training and Practice Tasks w/o supervision		
Attend 1 Closing (if applicable)		
Overview of Tracking and Reporting		
Review a & Take Ownership of Monitoring Website		

After week three the task training list will begin to dwindle because the new hire will begin to take ownership of different responsibilities. Their day will be filled with these new responsibilities and they will begin to add more challenging and complex tasks or responsibilities at a slower rate.

Week 4

Task	Assigned To	Date Completed
Take Ownership of Daily CRM/ Data Entry Tasks		
Shadow Track & Reporting Activities		
Meet with Primary Vendors		
Tour of Market Area		
Review Schools for primary selling communities		
Guided Practice of Track & Reporting Activities		
Review 3 Pending Buyer Files (if applicable)		
Review 3 Completed, (Closed) Buyer Files (if applicable)		
Set Goals for First Quarter		
Review Session to Discover Pain Points in Training Process		

Week 5

Task	Assigned To	Date Completed
Revisiting Any Training as a Result of Review Session		
Transaction Cycle Review		
Transaction Cycle Shadowing		
Take Ownership of Tracking and Reporting Process		
Take Ownership of ALL incoming Calls		

Week 6

Task	Assigned To	Date Completed
Intro to Basic Prospecting		
Shadow Prospecting Calls		
Making 5 Prospecting Calls on Their Own		
Guided Script & Role Play with real Clients		
Take Ownership of Files Going into Transaction Cycle		

Week 7

Task	Assigned To	Date Completed
Set Prospecting Goals Based on Previous Weeks Progress		
Take Ownership of ALL Packages Pre-List, Listing,		
Review Farming Practices		
Take Ownership of Farming Marketing Activities		

Week 8

Task	Assigned To	Date Completed
Review of Financial Responsibilities Admin is to Take Ownership		
Review Offer Received Process & Take Ownership		
Review Session to Discover Pain Points in Training Process		
Revisiting Any Training as a Result of Review Session		

Week 9

Task	Assigned To	Date Completed
Review After Closing Procedure & Take Ownership		
Review Yearly Marketing Plans & Take Ownership		

Week 10

Task	Assigned To	Date Completed
Revisit Quarterly Goals Set in Week 4		
10 Week Review Session to Discover Any Pain Points		

Week 11

Task	Assigned To	Date Completed
Revisiting Any Training as a Result of Review Session		
Discovery Session to Add Processes or Admin Responsibilities		

Week 12

Task	Assigned To	Date Completed
Set Team Goals for Next Quarter		
Set Personal Goals for Next Quarter		