

Critical Path Agent Checklist | 2024

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| <ul style="list-style-type: none"> <input type="checkbox"/> Connect laptop to office printers — ASC <input type="checkbox"/> Join the local Board of Realtors <input type="checkbox"/> Get a key pad/app for opening lock boxes from your Board of Realtors <input type="checkbox"/> Set up with office ASC/Manager — office procedures <input type="checkbox"/> Sign up for required MLS Classes <input type="checkbox"/> MLS — Create profile/photo/email/phone for contact <input type="checkbox"/> Agent photo/bio — also send to Onboarding <input type="checkbox"/> Complete CB/C21 profile — ColdwellBanker.com/Century21.com | <ul style="list-style-type: none"> <input type="checkbox"/> Create profiles and add photo in Realtor.com <input type="checkbox"/> Announce via Facebook, Twitter, LinkedIn, and other social media <input type="checkbox"/> Email <i>I'm with CB/C21</i> announcement to your database <input type="checkbox"/> Announce you have joined CB/C21 via postcard mailing <input type="checkbox"/> Online Marketing Project Request Form <input type="checkbox"/> Like company Facebook page, join private FB group, join FB GenBlue group <input type="checkbox"/> Set up your Moxi website |
| <ul style="list-style-type: none"> <input type="checkbox"/> Affiliate Introduction <input type="checkbox"/> AMP (LIVE) <input type="checkbox"/> AppFiles/Dot Loop <input type="checkbox"/> Buyer Strategies <input type="checkbox"/> Expireds <input type="checkbox"/> Facebook Business Page <input type="checkbox"/> Farming Class <input type="checkbox"/> Global Luxury <input type="checkbox"/> Goal Setting <input type="checkbox"/> Google Workspace (formerly GSuite) <input type="checkbox"/> Know Your Value <input type="checkbox"/> ListTrac <input type="checkbox"/> L2L <input type="checkbox"/> Moxi Engage <input type="checkbox"/> Moxi Mondays <input type="checkbox"/> Moxi Present | <ul style="list-style-type: none"> <input type="checkbox"/> Moxi Website <input type="checkbox"/> Our History <input type="checkbox"/> Open House Class <input type="checkbox"/> Outlist/Outlast <input type="checkbox"/> Prospect Square <input type="checkbox"/> Put Goals in Moxi Engage <input type="checkbox"/> Schmidt Resources <input type="checkbox"/> Seller Strategies <input type="checkbox"/> Set Up CMA <input type="checkbox"/> Social Media <input type="checkbox"/> Sphere of Influence <input type="checkbox"/> Testimonial Tree <input type="checkbox"/> The Marketing Group <input type="checkbox"/> Withdrawns |

Critical Path Checklist (Continued)

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- Add contacts/database to Moxi Engage – email to all contacts
- Coaching – with Terrie Hoyle
- Contact The Marketing Group to get a professional email signature, bio, and announcement postcards
- Practice CMAs
- MLS – practice basic navigation
- Familiarize yourself with our inventory
- Prepare a presentation in Moxi Present
- Practice writing contracts
- Visit new home developments, preview units in condo complex (vacant are best), and familiarize yourself with amenities, monthly dues, pet policies, etc.
- Visit open houses with others within our company
- Take a contract class at the Board/Attorney
- Attend office and regional meetings as scheduled
- Complete a Value Proposition online – customize and print
- Schedule an appointment with your manager and review your “check-offs” and “to-dos” at least once a week

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