



ONBOARDING CHECKLIST

INTRODUCTION PHASE DAY 0 – DAY 30

- ☐ Log in to MAX/Center and register remax.net email address
- ☐ Meet your Technology Engagement Consultant (TEC)
- ☐ Complete Technology Overview Learning Track via RU

BROKER/OWNER 101 TRAINING

- ☐ Schedule next available Broker/Owner 101 Training with Onboarding Specialist
- ☐ Attend Broker/Owner 101 Training

OFFICE FOCUS

- ☐ Submit three trade name options, “Doing Business As” (DBA), to the Onboarding Specialist for region approval
- ☐ Sign Name Change Addendum via DocuSign
- ☐ Submit Service Area Request Form for region approval (Approved city plus seven more. Improved searchability via remax.com)
- ☐ Review compliant domain and URL Standards with Onboarding Specialists after region approval of DBA
- ☐ Review Trademark and Graphic Standards Manual

OFFICE LOCATION

- ☐ Submit potential office location within approved area to Onboarding Specialist for region approval. Include: direct address, exterior/interior photos, and square footage
- ☐ Sign Office Location Change Addendum and return via DocuSign to Onboarding Specialist

STRUCTURE PHASE DAY 31 – DAY 60

PREPARE STATE FORMS/BROKER OF RECORD

- ☐ Discuss confidential status with Onboarding Team
- ☐ Discuss with the Onboarding Team the process of filing Articles of Incorporation with the Secretary of State
- ☐ Send Articles of Incorporation for Onboarding Specialist to prepare DocuSign Amendment
- ☐ Hire Broker of Record prior to filing with Real Estate Commission
- ☐ Submit approved DBA to Real Estate Commission (Must have DBA and location approved with Region before submitting for approval to the State.)

ESTABLISH TIMELINE TO OPEN

- ☐ Meet with Onboarding Specialist to establish Open Date based on RE/State Approval timeline and location buildout

LOGO/SIGNAGE (REVIEW TRADEMARK AND GRAPHIC STANDARDS MANUAL)

- ☐ Submit external signage to Onboarding Specialist for approval by region
- ☐ External signage approval obtained prior to purchase
- ☐ Submit logo to Onboarding Specialist for approval by region
- ☐ Logo approval obtained prior to purchase

Continued ...



OFFICE SETUP (REFER TO APPROVED SUPPLIER ROAD MAP)

Office Layout

- ☐ Explore options for Office Layout: traditional, café style, or mixed

Office Supplies

- ☐ Phone number
- ☐ Internet
- ☐ Copier/Servers
- ☐ Office supplies
- ☐ Computers
- ☐ Printers
- ☐ Janitorial needs

Software (Broker/Owner 101 will help you explore options)

- ☐ Region approved domain per Trademark and Graphic Standards Manual
- ☐ Choose Accounting Software
- ☐ Choose Transaction Software — e.g. DocuSign
- ☐ Create social media accounts; be careful with Confidential Status

FRANCHISE DEVELOPMENT INTRODUCTION

- ☐ Meet your Franchise Development Consultant (FDC) at Broker 101
- ☐ Review Business Plan with your FDC after Broker 101
- ☐ Register for the next Momentum 2.0 training

Agent Focus and Office Setup

- ☐ Determine office Mission/Vision/Value/Beliefs
- ☐ Explore joinremax.com to understand the RE/MAX Value Proposition
- ☐ Explore MAX/Center for “Build Your Business with RE/MAX” campaign materials
- ☐ Establish office value while leveraging joinremax.com
- ☐ Why should someone join your office?
- ☐ Review and customize commission plans

Office Administration

- ☐ Establish work description for administrative staff
- ☐ Develop addendums for teams and commission plans

TECHNOLOGY ENGAGEMENT INTEGRATION

- ☐ Post Broker 101 Meeting with TEC:
 - ☐ Review MAX/Center resources
 - ☐ Complete relevant webinars and Learning Tracks
 - ☐ Create timeline with TEC for pre and post open status

INSURANCE

Insurance Compliancy

- ☐ Review Insurance Requirements (refer to first onboarding follow-up e-mail)
- ☐ Secure E&O Insurance
- ☐ Obtain General Liability Insurance
- ☐ Once complete, send proof of E&O and General Liability to the Onboarding Team (onboarding@remax.com)

FRANCHISE DEVELOPMENT HAND-OFF AND REGION ANNOUNCEMENT

- ☐ Complete questionnaire to help region announce you to surrounding offices
- ☐ Meet with Franchise Development Consultant (FDC) to discuss a plan for post-open phase
- ☐ Work with FDC to plan a grand opening.

Manuals/Contracts

- ☐ Establish an Office Policy Manual
- ☐ Establish an Employee Manual
- ☐ Establish an ICA (refer to Model ICA, Essential Provisions)

Recognition Programs and Awards

- ☐ Learn about RE/MAX Career and Club Awards
- ☐ Learn about Regional Top Producers and Awards

Marketing Materials

- ☐ Explore marketing materials and resources through Megaphone and RE/MAX Marketplace
- ☐ Explore RE/MAX Marketplace for RE/MAX Commercial, The RE/MAX Collection, Awards, and Approved Suppliers

PR and Social Media Strategy

- ☐ Complete PR Template facilitated by Onboarding Team
- ☐ Establish a social media plan for the office
- ☐ Join relevant RE/MAX social media platforms (leverage FDC)

Event Engagement

- ☐ Reach out to conventions@remax.com for upcoming network events
- ☐ Check with your FDC for upcoming region events

Children's Miracle Network

- ☐ Visit beamiracleagent.com to enroll
- ☐ Review Children's Miracle Network (CMN) Miracle Home Program
- ☐ Determine if the office will participate in the program
- ☐ Secure CMN partnership logo

POST-OPEN ONBOARDING ITEMS

- ☐ Complete onboarding survey
- ☐ Schedule Post-Open Call with TEC
 - ☐ Publish booj Office Website
 - ☐ Complete IDX Set-up with TEC
- ☐ Register for the next Agent 101 Liftoff
 - ☐ Create a New Agent Welcome Package (leverage House of Magnets or an Approved Supplier)
 - ☐ Create an onboarding checklist for new agents (leverage FDC/Onboarding Team)
 - ☐ Save the Date for future Agent 101 Trainings for all new agents
 - ☐ Setup agent concierge services
- ☐ Billing & Membership
 - ☐ Schedule a meeting with your Billing & Membership Coordinator to live-drive paying your first bill
 - ☐ Attend Agent & Office Portal Webinar
 - ☐ Add Agent on Agent & Office Portal