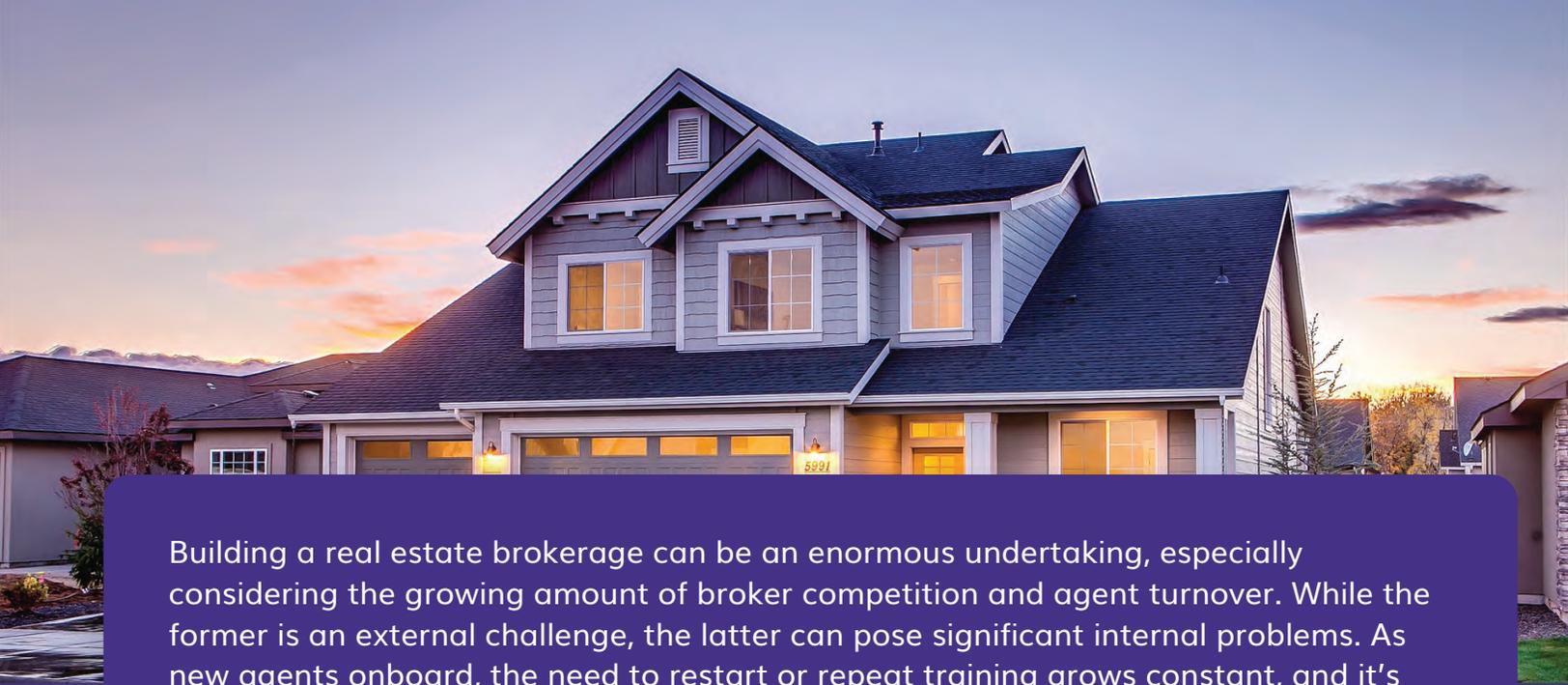


**How To Automate New Agent  
Onboarding and Build Your  
Brokerage Faster**



Building a real estate brokerage can be an enormous undertaking, especially considering the growing amount of broker competition and agent turnover. While the former is an external challenge, the latter can pose significant internal problems. As new agents onboard, the need to restart or repeat training grows constant, and it's hard to keep up.

## Churn: A real estate brokerage's biggest threat

Agent turnover is problematic for brokerages looking to retain top talent—and with that turnover comes countless hours of work and training trying to get a new agent onboarded. If your brokerage is growing, you will find a constant need to onboard and train additional agents. If there's no solid plan in place to handle this repetitive and critical task, agent training can become your brokerage's weak link.

## Chaotic training procedures waste time, money, and resources

The time commitment required to train a revolving door of agents can be a drain on resources and the result is segmented knowledge. Small subgroups of agents at various stages of training emerge, some of who may be receiving expedited, incomplete, or ad hoc instruction. If only one person is responsible for the training process, they may quickly become overwhelmed. If multiple people share the training responsibility, agents can become vulnerable to conflicting information.

A priority for your brokerage will be to overcome this weak link so you can:

- Attract talented and motivated agents
- Quickly and efficiently train
- Equip agents with the knowledge they need to get out into the field

## Automation of repetitive tasks is key to positioning for growth

By automating your onboarding system, you'll be on your way to a hands-free approach to training. To optimize for success, materials in your automated system should be comprehensive, organized, and well-integrated.

An effective onboarding strategy will:

- Ensure every agent receives the correct and complete information required for them to perform at the level required by your brokerage
- Develop more engaged, knowledgeable, and committed agents who now feel connected to and invested in your brokerage
- Free up time that can be spent on gaining more listings and representing more buyers in order to build the brokerage up faster
- Encourage higher levels of productivity in the form of more houses sold, more sellers and buyers recruited, and more network expansion
- Help develop a cohesive brand communication, both externally and internally, as all agents will now have the same basic concepts and core values presented to them from step one
- Reinforce higher agent retention, as agents trained to work specifically within your brokerage will find it easier to improve and advance without seeking employment elsewhere
- Maintain steady, positive business growth since agent onboarding is no longer a drain on brokerage resources

## Developing an automated agent onboarding process

Automation of your onboarding system can help you create an effective onboarding funnel ensuring agents receive all of the information, education, training and tools they need to succeed.

To start, document all of the following:

- **Core values:** The first step of agent training should always be a crash course in your brokerage's history, messaging, and goals. Making interaction with this part of the training service a gateway to the rest of the material ensures new agents become familiar with your brokerage's commitments and expectations.
- **Policies:** Detailing your external and internal policies within the onboarding framework mandates their review and allows you to demand accountability from agents.
- **Training processes:** Bring all of your brokerage information that agents need to know together in one place and sort them into sequential order. Having a clear route from the start of the onboarding process to its finish will ensure no steps are missed and that there is consistency from agent to agent in the way information is provided and absorbed.
- **Frequently asked questions:** A comprehensive FAQ can be one of your most useful training assistants, and can cut down on time spent repeatedly answering familiar questions.
- **Resources:** You can automate other repeatable tasks by tying in reference material, documentation of standard operating procedures, "cheat sheets," and other valuable training tools.

## Leverage technology to connect your assets

A system that allows you to centralize all your external assets into your onboarding process will heighten your training experience for agents. A proper system should be able to support your most used third party tools, which may include many of the real estate brokerage industry's most powerful platforms:

- **DotLoop for transaction management:** One of the most popular end-to-end real estate transaction management software systems should be able to integrate seamlessly to allow ease of access from within the training system. New agents can quickly and conveniently learn your workflows for compliance, storage, form editing, and digital signatures.
- **Gusto for payroll:** Onboarding new agents includes setting them up for payroll, handling benefit allocation, detailing schedules, and handling other HR-related tasks. Gusto integration options would allow you to keep utilizing the tools you know and trust to manage human resources and accounting.
- **Loom for video:** Loom integration means being able to quickly record, upload, and share videos within the system—an excellent way to handle any additions to the training or onboarding process and to demonstrate simple tasks that are easier to show than to tell.

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## One solution for automated onboarding: Trainual

Trainual is a comprehensive, interactive depository of knowledge for your brokerage. By allowing you to collect all of your internal knowledge and documentation about your company and how to work within it in one place, you can streamline onboarding and training to empower your incoming and existing agents with tools they can access at any time.

Unlike keeping training materials and operational knowledge in Word, Dropbox, or Google Drive, Trainual allows you to track exactly who has seen what and when. You're able to add videos anywhere that needs more explanation. You can use tests to make sure that what you're saying to your agents is perfectly understood. And every bit of information would be grouped intuitively into every unique role in your business so no one has access to more than they need or feels overwhelmed with job responsibilities.

## Trainual is a powerful recruitment tool

Attracting top talent as a brokerage is a priority and a streamlined onboarding experience could be the key to recruiting and retaining agents. When a brokerage goes the extra mile to make things easier for incoming agents, loyalty is increased; when an investment is made in an agent, that investment can be returned many times over.





"On recruiting appointments I actually use Trainual as a differentiator for our brokerage. It's a value add that attracts new agents when I talk about how easy and streamlined our onboarding experience is. If you're serious about growing your brokerage, you need to invest in software to leverage your time and your people. Growing like we were, I would have had to either clone myself and my time or hire multiple people just to train new agents, or, use Trainual."

Keith Pike - Broker / Owner - RE/MAX Elite

Rapidly scale your real estate brokerage and stand out during the recruitment process with Trainual. With Trainual, your brokerage can stand out during the recruitment process by allowing you to offer agents:

With Trainual, you can offer agents:

- Swift, convenient, and efficient training
- Fewer scheduled group sessions
- A fully comprehensive and integrated onboarding experience
- The ability to complete training from anywhere, at any time

The growing pains associated with rapid expansion no longer have to include the hassles of new agent onboarding and multiple training sessions. Instead, agents can be fed into the funnel of an automated training system and speedily equipped with the knowledge and tools they require to begin selling as soon as possible.

## The benefits of Trainual don't stop with onboarding

With full integration of real estate brokerage tools like DotLoop, Gusto, Loom, and Trainual, your brokerage is armed with a complete ecosystem of agent support tools, empowering them to represent you and your clients to their fullest on a daily basis. Agent satisfaction goes up, employee turnover goes down, and your business grows faster.

With Trainual specifically, brokerages can scale up quickly without worrying about seasonal onboarding and training waves. There's no need for time and effort to be wasted monthly on repeated processes. Instead, agents can train as needed with minimal resource allocation, improving your brokerage's bottom line.

Are you ready to experience unprecedented brokerage growth? Sign up for a free trial of Trainual today, and discover how stress-free your agent onboarding process could be.

START TRIAL

# BONUS ONBOARDING PLAN

Days from hire date	Process	Individual task or review item
Days 1-5: HR	Agent Induction	<ul style="list-style-type: none"> <li>• Payroll</li> <li>• Benefits</li> <li>• Scheduling</li> <li>• Leave &amp; Time Off</li> </ul>
Days 3-7: Orientation	Company Overview	<b>QUIZ</b> <ul style="list-style-type: none"> <li>• History</li> <li>• Mission</li> <li>• Core Values</li> </ul>
	Internal Policies	<b>QUIZ</b> <ul style="list-style-type: none"> <li>• Office Safety</li> <li>• Compensation</li> <li>• Performance Reviews</li> <li>• Termination Policy</li> <li>• Brand Voice</li> <li>• Social Media Policy</li> <li>• Code of Conduct</li> <li>• Sexual Harassment Training</li> </ul>
	Expectations	<b>QUIZ</b> <ul style="list-style-type: none"> <li>• Customer Relationships</li> <li>• Client Visits</li> <li>• Sales Meetings</li> <li>• Travel Requirements</li> <li>• Insurances</li> <li>• Safety Protocols</li> <li>• Brokerage / Agency Relationship</li> <li>• Mandatory Buyer Events</li> <li>• Strongly Suggested Buyer Events</li> <li>• Agency Disclosure</li> </ul>

Days 5-12: Training	Standard Operating Procedures (SOPs)	<b>QUIZ</b> <ul style="list-style-type: none"> <li>• Listing Procedures</li> <li>• Buyer Qualification</li> <li>• Sale Contract Advertising</li> <li>• Risk Reduction</li> <li>• Record Retention and Destruction</li> <li>• Do Not Call Policy</li> <li>• Asking for Referrals</li> <li>• Follow-up Procedures</li> <li>• Sales Contract Negotiation</li> <li>• Reporting Requirements</li> </ul>
	FAQ	<b>QUIZ</b>
	Agent Handbook	<b>QUIZ</b>
	Tools	<b>QUIZ</b>
		<ul style="list-style-type: none"> <li>• Transaction Management</li> <li>• Scheduling</li> <li>• Other Tool</li> </ul>
Days 7-15: Launch	Agent Profile	
		<ul style="list-style-type: none"> <li>• Transaction Management</li> <li>• Scheduling</li> <li>• Other Tool</li> </ul>
Ongoing support	Agent Toolkit	
		<ul style="list-style-type: none"> <li>• Agent Handbook</li> <li>• FAQs</li> <li>• SOPs</li> <li>• Dos and Don'ts</li> <li>• Approved Verbiage</li> <li>• Sample Scripts</li> <li>• Talking Points</li> <li>• Buyer Pain Points</li> <li>• Pitch Assistance</li> <li>• Closing Assistance</li> <li>• Tool Access</li> <li>• Support Contracts</li> </ul>