Welcome to the Team
ONBOARDING & TRAINING AUTOMATION CHECKLIST

AGENT INFORMATION:

Name _____

Office _____   Job Title _____

Start Date _____   Reviewer Name _____

ONBOARDING CHECKLIST ITEMS

Phase 1: Pre-Onboarding

- ○ Send a Welcome Email with key contacts and expectations
- ○ Provide access to internal communication tools (Slack, Email, CRM login, etc.)
- ○ Add agent to the Team Roster & introduce them internally
- ○ Share your onboarding calendar and Day 1 schedule
- ○ Deliver a branded "Agent Launch Kit" (PDF or physical)

Phase 2: Week 1 Launch

- ○ Assign Day 1 Orientation Lesson (company mission, tools overview)
- ○ Walk through company tools (CRM, MLS, marketing suite, etc.)
- ○ Schedule a one-on-one with their team leader or broker
- ○ Provide access to Power Unit University portal (or your training hub)
- ○ Have them complete the SuccessIndex™ Assessment to evaluate strengths and gaps
- ○ Assign the "New Agent Fast Start" track inside PUU (or your program)
- ○ Set up a shared tracker or dashboard to monitor their progress

Phase 3: Training Automation System

- ○ Use a structured Learning Path that auto-assigns lessons weekly
- ○ Enable automated reminders for incomplete training
- ○ Incorporate Smart Trackers to log agent performance metrics
- ○ Schedule bi-weekly check-ins (15 mins max) to review their progress
- ○ Track completion of onboarding lessons and certification milestones
- ○ Set trigger points for bonuses or recognition (e.g. finish first 10 lessons = award)

Phase 4: Self-Accountability Structure

- ○ Teach agents how to navigate PUU or their training dashboard independently
- ○ Have them share 3 takeaways from each lesson with their mentor/coach
- ○ Assign them a 30-day "launch goal" with measurable KPIs
- ○ Introduce them to daily Power Hour routines (15 minutes/day inside the platform)
- ○ Enroll them in your referral, social media, or lead gen playbooks via PUU
- ○ Encourage participation in the agent community (discussion groups, live calls, etc.)

Phase 5: Retention & Growth Pathway

- ○ Schedule their 30-day performance review with leadership
- ○ Share SuccessIndex progress report (highlight improved pillar scores)
- ○ Promote them into an "Advanced Track" inside the platform
- ○ Identify leadership opportunities (mentor, trainer, team builder)
- ○ Re-assign goals based on production level and updated skill set
- ○ Celebrate their training milestones in your internal announcements

MILESTONE TRACKER

- □ Completed onboarding checklist
- □ Finished Week 1 training track
- □ Logged into training platform 5+ times
- □ Attended first live coaching session
- □ Completed SuccessIndex™ Assessment
- □ Booked first appointment or lead call
- □ Achieved 30-day onboarding goal

CONVERSATION & COACHING POINTS

1. What is the agent struggling with most right now?
2. How confident do they feel in using the systems?
3. What's one thing they say they need more support with?
4. What lesson or training has resonated most so far?
5. What behavior (positive or negative) has stood out?

AGENT COMMITMENT

"I commit to focusing on these goals over my first 30 days..."

1. _____

2. _____

3. _____

_____
Agent Signature

_____
Date

FOR REVIEWER

- □ Review agent's SuccessIndex™ results
- □ Assign Fast Start training track
- □ Invite agent to weekly Power Hour
- □ Schedule 30-day review call
- □ Add agent to accountability group
- □ Recognize onboarding progress internally