

GETTING STARTED

ASAP

- ☐ Update your IABS. Info on www.ureportal.com
- ☐ Explore ureportal.com: Office addresses, license numbers, staff contacts, logos and a sample IABS form
- ☐ Create a new email if currently using a personal/nonprofessional one
- ☐ If marketing or operating under a different name other than what is on your real estate License, please let us know so we can record with the state
- ☐ If you have a DBA or LLC, we will need copies of organizational documents for the state.
- ☐ Program in your phone 817-900-2205. This is the number to call on Monday mornings at 9:30 am for our weekly brokerage call.
- ☐ Program in your phone 833-459-3350. This is the number you will receive text messages from the brokerage. This is our main form of communication with you.
- ☐ Add to your calendar our monthly meeting is typically on the 3rd Thursday of the month from 10:00 am – noon
- ☐ Send your current headshot to United or order a new one.

First Week

- ☐ Set appointment with Brenda to work through getting started checklist
- ☐ Update or let us help with the following:
 - ☐ Voicemail and email signature
 - ☐ Social Media - FaceBook – Business & Personal, LinkedIn, Twitter, Google Info, Instagram, Tiktok
 - ☐ Add IABS and TREC Consumer Protection Notice to your email signature, and Social Media
 - ☐ MLS: Update signature, header info, CMA cover sheet, Agent Webpage & OneHome, Instantnet/Zipforms: personal profile, email signature
 - ☐ Realtor.com - profile page and contact info and Texas REALTORS - profile page and contact info (Also update Zillow profile and Homes.com profile)
 - ☐ Chamber Memberships & Nonprofit Memberships, etc that you might be a member of.
- ☐ Bookmark the following sites we will send you your login info via separate email
 - ☐ BullsEye (Website management, Contact Management, Training, etc)
 - ☐ Paperless Pipeline
 - ☐ UREportal.com
- ☐ Send or Accept FaceBook Friend Request to Brenda
 - ☐ Accept Request to join Private Facebook Page
 - ☐ "Like" UnitedRealEstateinsight and UnitedRealEstateDFWProperties Consumer facing pages

Marketing

- ☐ Prepare a list of who you will notify that you have joined United.
- ☐ If you have a domain name, send it to Brenda– BullsEye support can assist you with linking your domain name to your website
- ☐ Purchase a domain name if you do not have one and want one. This is strictly your choice. Your domain name will be pointed to your United website
- ☐ Download Logos are on ureportal.com

- ☐ We will order your initial business cards and name tags. This is a great time to brand yourself. Resources for marketing material can be found on your Dashboard of BullsEye. You will receive your login as a part of your Onboarding.
- ☐ Find your Vendor team on URE Portal or get local vendor recommendations from Brenda.
- ☐ Notify your future clients & customers, sphere, family, neighbors and friends that you have made a move (or started your own business).

Training

- ☐ Review the follow courses in the learning academy
 - ☐ Introduction to Bullseye – Pathway Course
 - ☐ Agent Website Interactive Course – Pathway Course
 - ☐ Bullseye CRM Interactive Course – Pathway Course
 - ☐ Introduction to the Marketing Resource Hub – Pathway Course
 - ☐ Why LeadBoost?
- ☐ MLS orientation if needed,
- ☐ Find out the date of Brenda's next contract class.

Value

Review the United value checklist to see if there is anything you need more information on. Are you plugging into all the value of being part of United including:

- ☐ Leadboost
- ☐ United Referral Network
- ☐ The Bullseye Platform: Industry leading suite of marketing and technology offerings.
- ☐ Free CE and Legal I and II.
- ☐ 15 minute launch your week conference call.
- ☐ Live and onlines classes every week..
- ☐ Just Listed/Just Sold postcard program,
- ☐ 5 Year client Follow up plan
- ☐ Marketing Hub (Inside Bullseye)
- ☐ Marketplace and Zillow Showcase
- ☐ Mentorship
 - ☐ New Licensee
 - ☐ Commercial
 - ☐ Property Management
 - ☐ Farm and Ranch
 - ☐ Auction
- ☐ Commission payments directly to your registered LLC.
- ☐ 250 x 250 Program for recruiting
- ☐ Wealth Building Strategies
 - ☐ Smart Dollar; Budgeting tools, guided financial plan, monthly group and one on one coaching.
 - ☐ Creative Planning.com
- ☐ Our Healthcare plan offers agents and staff access to affordable, high-quality PPO health plans, dental, vision and supplemental insurance.