ONBOARDING SMOOTHLY

FROM NEW LICENSEES TO SEASONED PROS, ENSURE EVERY AGENT STARTS STRONG.
A structured onboarding process sets clear expectations, boosts productivity and reinforces your brokerage's culture. Use the GMAR's Onboarding Checklist to create a consistent experience that keeps your agents informed, compliant and ready to perform from day one.

STEP 1: AGENT TYPE

Newly Licensed Agent:

- ☐ Activate their real estate license with sponsorship by your brokerage. https://dsps.wi.gov/Credentialing/Business/fm812.pdf
- ☐ Apply for membership with the GMAR and MLS to gain access to listings, industry tools and state licensing advertising rules. https://gmar.com/application-for-membership/
- ☐ Enroll in your brokerage's new-agent training and mentorship program for guidance on compliance, contracts and lead generation.

Experienced Agent:

- ☐ Transfer their existing real estate license under your brokerage with the DSPS (WI Department of Safety and Professional Services). Confirm termination by previous broker.
- ☐ Update membership records with the GMAR and MLS to reflect your brokerage affiliation. https://gmar.com/membership/become-a-member/change-your-information/
- ☐ Provide a condensed onboarding experience focused on brokerage-specific systems, policies and technology.

ONBOARDING TIP:

Create tailored onboarding paths (new vs. experienced)
to save time and improve engagement.

STEP 2: COLLECT INFO AND COMPLETE CORE AGREEMENTS

Collect:

- ☐ Personal details: address, phone, email, tax ID and emergency contact.
- ☐ License verification and documentation (ensure current standing with the DSPS).
- ☐ Payment and commission setup preferences.

Sign:

- ☐ Independent Contractor Agreement (ICA): outlines expectations, legal status and responsibilities.
- ☐ Commission Structure Agreement: defines splits, bonuses and payment methods.
- ☐ Specify direct pay or payment to an LLC/S-Corp.
- ☐ Collect W-9 or entity/tax documentation upfront.
- ☐ Policy & Office Manual Acknowledgment: ensures understanding of brokerage policies, marketing standards and compliance protocols.

ONBOARDING TIP:

Store all signed agreements securely in a digital HR or compliance system. Use Docusign or another secure e-signature platform for efficiency and record-keeping.

STEP 3: ACTIVATE SYSTEMS AND TOOLS

- ☐ Share local, state and national associations' contact information.
- ☐ Ensure agents are receiving GMAR, WRA and NAR communications.
- ☐ Share Associations' resources like SentriLock, TetherRE, ZipForms with agent.
- ☐ Create brokerage email and set up MLS and website credentials.
- ☐ Add agent to your CRM, transaction management and lead systems.
- ☐ Set up direct deposit and confirm commission disbursement details.
- ☐ Order branded business cards, name badges and marketing templates.
- ☐ Provide access to shared resources (e.g., templates, scripts and branding guidelines).

ONBOARDING TIP:

Send a welcome email that includes login links, system guides and key contact information.

STEP 4: SCHEDULE TRAINING AND ORIENTATION

Required Orientation:

- ☐ Complete GMAR new member orientation including videos, new member ethics course through NAR and Pathways to Professionalism exam (mandatory for all new licensees). This information is provided via email from the Membership Director.
- ☐ Complete MLS orientation.

Brokerage Training:

- ☐ Review file submission procedures, agreement protocols and compliance steps.
- ☐ Introduce internal platforms: transaction management, CRM, marketing portal, etc.
- ☐ Cover client communication best practices and brokerage-specific tools.
- ☐ Review appropriate usage of REALTOR® trademarks.

Mentorship:

- ☐ Pair new agents with an experienced mentor or "buddy" for hands-on guidance.
- ☐ Schedule weekly or biweekly check-ins during the first 90 days.

STEP 5: LAUNCH THE SUCCESS PLAN

- ☐ Help every agent start their career with structure and confidence.
- ☐ Set 30-, 60-, and 90-day goals covering prospecting, training and transaction milestones.
- ☐ Schedule recurring performance check-ins to measure progress and provide feedback.
- ☐ Encourage early wins, such as completing first listing presentation or client appointment, to build confidence and retention.

ONBOARDING TIP:

Provide a printed or digital onboarding calendar so agents can track their progress.

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