



Welcome to Allison James Estates and Homes! We are thrilled to welcome you to our amazing real estate firm and are excited about providing great broker support to you as an agent. The next seven days are critical in getting you in the “all systems go mode” for functioning as an Allison James Estates and Homes agent.

New Agent Seven Day Checklist

(Items do not need to be completed in this order).

- Change affiliation at (or join) Board of REALTORS.
- Change affiliation at MLS.
- Transfer listings (if applicable).
- Attend one of our weekly webinar training sessions (30 minutes). This training will show you how to use our systems, scroll down to select a date. [Click to register](#).
- Obtain login for [SkySlope](#) and our [AgentMarketing](#) and AJI University You will receive or have already received an email with this info.
- Fill out form: [Website and Social Media Review](#).
- Please view our SkySlope orientation and training videos here:
 - [Basic SkySlope Training](#)
 - [How to Create a Transaction](#)
 - [Agent Marketing Training](#)
- [Upload headshot photo to Agentmarketing](#)
- Review the document: [Allison James Estates and Homes Procedures and Best Practices](#)
- Change company name on your voicemail.
- Change company name on email signature.



- Change company name on your website(s).

- Please inform your contacts that you have switch to a new Brokerage. (If you would like one of our Corporate Team members to do this for you, please let us know)

Best practice is to have your license number and firm name Allison James Estates and Homes on the footer of all pages on your website.

- Change company name on Facebook (if you have a Facebook account).

- Learn how to use Digisign in SkySlope or you may continue to use your own digital signature software. All documents that need broker or corporate signatures must be tagged for digital signature before sent. [Click Here](#)

- Print an updated/corrected copy of your license and email it to your Broker
- Order business cards. [Click Here](#)

Final step: Certify that these items have been completed.

(Print this and send a signed copy to your broker. **Please see print button below to print only the checklist.** You may digitally sign this form).

Agent Name _____

Signature _____

Date _____