

Franchise Onboarding To Do List Phase 3

Operational Flow

- ☐ On boarding a new agent (docs and who will input in the Zone)
- ☐ Who will handle onboard training? (See Below for Job Description)
- ☐ What is the job description and roles of each person:
 - ☐ TC/Compliance Person
 - ☐ Manager the oversees operations
 - ☐ Managing Brokers
 - ☐ Marketing
- ☐ Determine who or how you will handle agent real estate related questions.
- ☐ Who will do the agent trainings for new tools, Moxi Works, etc.
- ☐ Who will be involved in the agent recruiting meetings?
- ☐ Who will manage social media?
- ☐ When will you have your sales meetings?
- ☐ How will you handle the Transaction Coordination and Compliance flow?
 - o CDA's and final approval for commissions
- ☐ How will salary be paid to employees and when?
- ☐ How will Commissions be dispersed?
- ☐ Who will have access to the checking account for deposits and writing checks?
- ☐ How will you receive your transaction fees from a closing (Wire, Check)?
- ☐ Who will handle corporate compliance
- ☐ Comm Log
- ☐ Validating Transactions and Agent Count
- ☐ 2% Gross Profit Form submitted to ROGA
- ☐ Monthly Agent Billing for outstanding receivables, etc.
- ☐ Referrals: who signs and will you provide a referral fee if you provide lead to an agent