Appendix D: 90-Day Team Onboarding Companion

The bones of this framework came from Elias. Charlotte refined the edges. Together they built an onboarding process that didn't just orient new agents — it set them up to actually produce. This is the companion guide for agents joining a team and reading The Foundation alongside the work.

Purpose

This appendix is a structured onboarding and execution guide for agents joining a team. It aligns directly with the three-part arc of The Foundation — each 30-day phase corresponds to one part of the book — and provides clear expectations, rhythms, and checkpoints for agent and leader alike. The goal isn't to rush through it. The goal is to build something that holds.

How to Use This Appendix

- Read alongside the book over 90 days — one phase at a time
- Execute weekly, not perfectly
- Review progress with your Team Leader, DOO, or Coach at regular intervals
- Focus on consistency, not speed — the foundation has to cure before you can build on it

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Days 1–30: Pouring the Foundation

Aligned with Part I of The Foundation (Chapters 1–7)

This phase is about establishing identity, building systems, and creating the daily rhythm that will carry everything else. Nothing fancy yet — just the groundwork.

Focus Areas

- Business clarity and professional identity
- CRM setup, tagging, and daily usage
- Financial awareness — know your numbers before the pressure hits
- Daily routines — build them now, before volume makes them feel optional

Weekly Expectations

- CRM fully built and contact database tagged

- Daily conversations logged every business day
- Burn rate calculated and written down
- Weekly schedule time-blocked and defended

Team Support

- DOO assists with systems setup and tool orientation
- CCC supports process orientation and workflow
- Leader provides weekly accountability check-in

Days 31–60: Framing the Business

Aligned with Part II of The Foundation (Chapters 8–13)

The structure is in place. Now you build the business-facing habits — pipeline discipline, client process mastery, and the first experiments with delegation.

Focus Areas

- Pipeline clarity — every contact has a status, a task, and a timeline
- Buyer and seller journeys — follow the process, every time
- Delegation and leverage — start identifying what shouldn't stay on your plate
- Metric awareness — know your numbers, not just your feelings about your numbers

Weekly Expectations

- CRM pipeline updated daily without exception
- Buyer and seller processes followed with consistency
- Delegation opportunities identified and discussed with leader
- Weekly review completed every Friday

Team Support

- CCC handles transaction coordination
- DOO supports workflow refinement as volume grows • Leader coaches prioritization decisions and pipeline review

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Days 61–90: Weight-Bearing Growth

Aligned with Part III of The Foundation (Chapters 14–19)

This is where the foundation gets tested. Volume increases. Time gets squeezed. The habits built in the first 60 days either hold — or they don't.

Focus Areas

- Consistent production under real workload pressure

- Time protection — Q2 work stays on the calendar even when Q1 is loud
- Market adaptability — reading the environment, not fighting it
- Confidence under load — trusting the systems you've built

Weekly Expectations

- Q2 business-building work protected on the calendar
- Referral conversations happening naturally, not as a campaign
- Marketing aligned with systems — no improvising
- Capacity recognized early — flag it before it becomes a crisis

Team Support

- Leader guides growth strategy and scaling decisions
- DOO adjusts systems to handle increasing volume
- CCC ensures client experience remains steady and consistent

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Weekly Review Checklist

Use this every Friday. It takes less than ten minutes. It keeps you honest.

☐ CRM updated — every active contact has a current note and next task

☐ Tasks assigned to every contact in the pipeline

☐ Pipeline accurate — no wishful thinking, no stale entries ☐ Time blocks honored — or honestly assessed if not

☐ One system improved, documented, or strengthened this week

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Leader Coaching Prompts

Use these in your weekly one-on-one with your agent. The goal is structure, not surveillance.

- Where did the agent default to reaction instead of intention this week?
- What system prevented chaos — and does the agent know that it did?
- What would break at higher volume? Is that being addressed now?
- What should be protected, defended, or rebuilt going into next week?

Completion Marker

At 90 days, a well-onboarded agent should be able to say — honestly — that they:

☐ Operate with confidence, not just effort

☐ Use systems instinctively, not occasionally

☐ Maintain consistent daily activity regardless of market noise ☐ Feel supported by the team, not overwhelmed by the volume ☐ Are prepared for the next stage of growth — and have already started building toward it

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The Foundation doesn't end at 90 days. It just means the structure is solid enough to build on. That's the point — not to finish, but to be ready.