



Teams Onboarding Guide

Team & Brokerage Onboarding Guide

Table of Contents

Initial Inquiry eXplained

Our Goal

Your Transition Staff

Points of Contact

Pre-Registration: Part One

Pre-Registration: Part Two

Registration-First Steps

Confirming Your Guest Pass

Completing your Application

License Verification

License Transfer: Part One

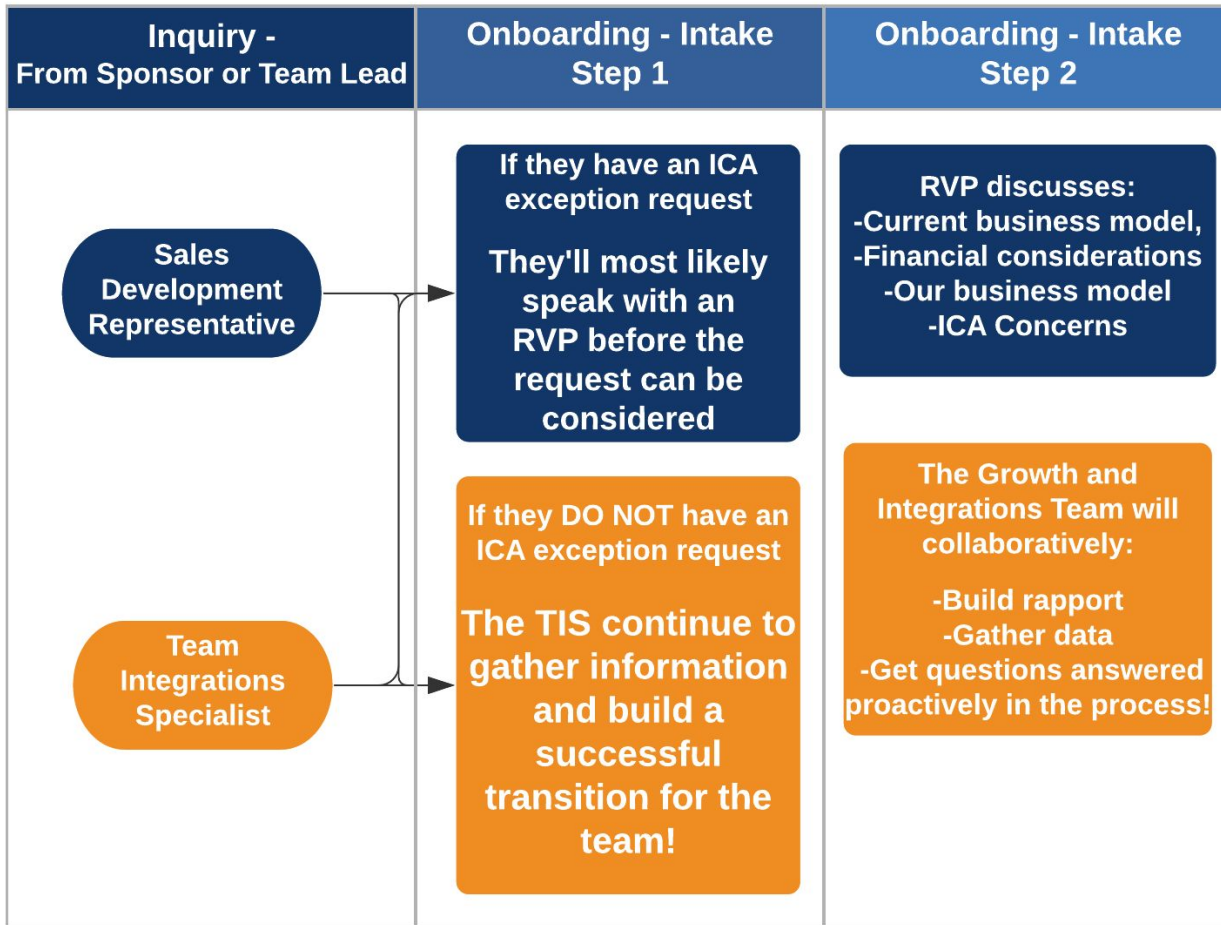
How to become a REALTOR

License Transfer: Part Two

Becoming Active

You're Active! Now what?

Welcome to eXp!



Growth & Agent Integrations

Collaboration to serve the agents!

Our Goal

Identify Agent's business needs so the correct expert is brought into the conversation at the right time before registering or applying!

Growth or Team Integrations?

Which group should Teams approach first?

We suggest Growth for those complex large Teams, Mega ICON Teams!

Moves that will require a lot of consideration and discussion about business models before you are comfortable saying "YES" to eXp Realty!

We suggest Team Integrations for smaller Brokerages and Teams who are ready to join or who don't need that extra insight or financial comparison to understand joining eXp Realty will explode their business.

You Can't Go Wrong

We're less concerned with who is approached so don't worry about making a mistake...what we seek with your help is to speak with teams BEFORE they Register or fill out the Join Application!

[Contents](#)



Staff involved in Team & Brokerage Transitions

Team Integrations Specialists (AI)

- Manage the Transition
- Coordinate the team of eXperts
- General Point of Contact through the Process

Team Integrations Professionals (AI)

- Manage the Join Application
- Manage Document Creation and Verification

Sales Development Representative (G)

- Assesses the needs of transitioning teams
- Coordinates RVP calls

Staff Continued

Regional Vice Presidents (G)

- Analyze and answer ICA exception requests
- Close the “YES” with interested leads
- Financial considerations

Special Brokerage and Team Experts (G)

- Work with RVPs to gather data needed for ICA exception requests and set expectations for success
- Work in tandem with TIS: observe early on and share the nuances of what makes the team tick
- Potentially stay present through Onboarding per RVP request

Staff Continued

Brokers/ASC

- State specific license laws
- Marketing & Team names
- Branch Office
- Compensation methods

Transaction Processing

- Payplan set-up
- Commission/Payment questions
- Skyslope set-up and questions

Regional Operations Managers

- Resource for Policies and Procedures
- Resource for exceptions

[Contents](#)

General Points of Contact

For Conversations & Follow-up with Transitioning Teams

At Inquiry

- Team Integrations Specialist

Discovery Call

- Team Integrations Specialist

Once ICA exception requests have been answered

- Team Integrations Specialist

All Other Stages or Needs

- Team Integrations Specialist will work with the RVP

Pre-Registration Teams & Brokerages

Discover what eXp Realty has to offer and how we can be a fit for you!



Consult with your local eXp Realty Agent

Got Questions?



Explore how your State functions at eXp Realty!

Things like team names, marketing, branch offices, sales or state specific business questions contact the Broker Team

- Check-out our [State Joining Guides!](#)
- Email - StateAbbreviation.Broker@exprealty.net
- Visit them in eXp World - GO TO menu in the upper left
 - Broker State Rooms from the drop down
 - Choose your state from the map.

Contents



Pre-Registration Teams & Brokerages

Plan your Transition!



**Spend some time with YOUR Team Integrations Specialist!
Planning your transition creates the BEST eXperience!**

Consult with one of our Team Integrations Specialists to learn about types of teams at eXp Realty & how to plan a transition to eXp Realty.

- Email TeamIntegrations@exprealty.net
- Call - 833-303-0610 - press 3 for Team Support
- Visit them in the World - From the GO TO Menu
 - Onboarding & Agent Support Lobby
 - Choose your State from the Doors down the right side of the Lobby Floor

[Teams](#) at eXp Realty explained Sample [Team Documents](#)

Contents



Registration - First Step Towards Onboarding



You and your Team Integrations Specialist will plan registration!

- Each Onboarding is unique so please coordinate with your Specialist before everyone registers!
- Sample Registrations:
 - Everyone logs on and a staffer is ready to connect the individual registrations
 - A team admin or staffer registers everyone



When it's time to register:

- Register at join.exprealty.com
- Our Tech Department will set you up with a Guest Pass

Registration - Confirming your Guest Pass



Confirm your Guest Pass to our Join Application dashboard

- eXp Realty Tech Services will email your Guest Account credentials with instructions on how to set up your Guest Account.
- Look for an email with the
Subject Line: Welcome from eXp Realty! Let's get started!
- You will normally receive this email within 30 minutes. If you do not, please contact your Team Integrations Specialist!



Before proceeding with your application, be mindful of the following:

- Be ready to name your sponsor (if you have one), this is an irrevocable decision. Questions? Here's a short [video](#) on sponsorship at eXp Realty.
- If you need, or think you need, a Letter of Intent for joining, review the [instructions here](#) before starting your application.

Contents

Completing your application



Be prepared with the following:

- Real Estate license number
- Preferred method of commission disbursement (personal or business as allowed in your state)
- Direct Deposit information
- Payment authorization for the set-up fee (charged once you've been converted to active within eXp Realty)
- Which REALTOR Association and Multiple Listing Service you wish to be affiliated with.
 - Have you gotten their transfer packet?
 - Do you know the costs associated with transferring or merging your Team or Brokerage account with eXp Realty?
 - Do you know the process of listing and contract transfer?

[Contents](#)

License Verification & ICA Review by eXp Realty Staff



This typically takes the team a few hours to complete (depending on the time & day you apply)

- Currently our Regional Teams review applications and ICAs by time zone
 - 8am - 5pm Monday-Friday
- Once reviewed
 - You will receive a text message it has been fully executed
 - To download your copy, you can login to your joining dashboard with your guest credentials from the email with the **Subject line: Welcome to eXp Realty! Let's get started!**
 - Please note, if revisions are needed, you will be notified via email first and phone or text later.

PRO TIP: Timing your Team's application allows for staff to be ready to process the Team's documents, review and verify them with minimal delays!

[Contents](#)

License Transfer & REALTOR/MLS affiliation by your State Broker Team



Your Broker Team will be reviewing your MLS, Association and License needs.

You'll know the Broker Team is busy working on your activation or transfer when you receive the email with the

Subject Line: Quick Update on License Transfer for eXp Realty

The process and timing of license transfer or activation varies by state, and some may have **agent-facing steps** you must perform as well.

So long as your application was planned with your Team Integration Specialist, your Broker & Transitions Team will be in constant communication with you!

Should you ever need to reach out:

- email StateAbbreviation.onboarding@exprealty.net
- drop into the World **Go To Menu** → **Broker State Floor** → **State**

*If you are in NY, TN & DE you MUST speak with the Broker team to progress with License Activation/Transfer per state regulations. Please be proactive in reaching out to the Broker Teams.

Contents



WHY and HOW to become REALTOR/MLS affiliated

- ✔ REALTOR Associations require licensees affiliated with a REALTOR Firm to become REALTORS themselves.
- ✔ eXp Realty is a REALTOR Firm. All agents who choose to join eXp must, within days of joining, associate themselves with a REALTOR Board and MLS eXp Realty belongs to.
- ✔ eXp Realty does not control the costs or steps associated with joining these organizations.
- ✔ Licensees need to be proactive in investigating the costs and steps PRIOR to joining eXp Realty.
- ✔ Many Associations provide the Sales Contracts & Forms, each state is unique. eXp Realty is not affiliated with a forms provider. Please confirm with the Broker Team or check the [State Joining Guide](#) for instructions in your state.

Other REALTOR/MLS Services



Ancillary services

- If payment or documentation for other ancillary services like Showingtime or eKey connectivity are required,
 - Make sure you deliver the documents to the Broker Team
 - Are ready to pay for the services
 - Are ready to get the signed documents to the Association/MLS so they can complete the affiliations and subscriptions.
- Questions?
 - Email StateAbbreviation.onboarding@exprealty.net
 - Visit them in the World from the GO TO menu in the upper left
 - Broker State Rooms from the drop down
 - Choose your state from the map.

Getting to Active Agent Status at eXp Realty!



Access your OFFICIAL Agent Passport account

- Look for your welcome email

Subject Line: Welcome to eXp Realty!

- Your eXp Passport will become active! Your Passport Account allows you to access many of the eXp Realty tools you will use with with just one password.
 - eXp Enterprise & My eXp - what and why
 - the Marketing Center
 - Workplace & Workchat (by Facebook) - why (computer, phone)
 - Official World access as an eXp Agent -The color of your name will change from green to blue!

[Contents](#)



Now that you're active with eXp Realty...



Skyslope

- You will receive an email **Subject: Welcome to Skyslope**
This is eXp Realty's paperless transaction management tool!



Business Cards

- Redeem your New Agent Welcome Kit here:
<https://exp.buildasignenterprise.com/new-agent-starter-kit>
- Review the Starter Kit FAQ for additional information:
<https://exp.buildasignenterprise.com/faq-2>
- **PRO TIP:** If you would like your website or RingCentral number on your cards, please make sure to set them up right away. Details in the [Getting Started Guide](#).

Contents

Welcome to eXp!



exp
REALTY

Back to Start