

A blue-tinted photograph of three business professionals (two men and one woman) celebrating. The man on the left is smiling with his arm raised. The woman in the center is smiling and holding a folder. The man on the right is shouting with his mouth open and arm raised, holding a folder. They are all dressed in business attire.

THE NEXUS GROUP | exp  
REALTY

# Onboarding Guide & Checklist

# What To Expect Next

Congratulations, on making the decision to join eXp Realty and #TeamBelladonna!

This guide is intended to assist you with your eXp onboarding process. It is meant to be used alongside with all of your eXp instructions and emails. It is NOT meant to replace your eXp onboarding process.

But, if you're anything like us, we thought you'd appreciate a roadmap that helps you along the way!

## How To Use This Onboarding Checklist

This guide will give you step by step instructions to complete your entire onboarding process with eXp. Here's what you'll find inside:

- Step-by-step instructions to follow with links.
- Instructions for moving your license if you are in the state of Utah
- A final checklist to make sure you didn't forget anything
- A comprehensive list of Exp resources and links!

By the time you're finished with this guide you will be a fully-operational eXp Agent, and ready to do business. Feel free to email me if you have any questions.

*Belladonna Riso*

Belladonna Riso (Associate Broker, eXp Realty)

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# eXp Onboarding Checklist

- ☐ **STEP 1: Complete Online Application and Sign Documents** - [Click here to apply](#) and sign initials documents
- ☐ **STEP 2: Receive a Copy of your signed ICA via email:** Prepare to move your license with your local state. If you have any questions, contact your eXp State Broker. For Broker info see the [directory](#). For UTAH License transfer, [click here](#).
- ☐ **STEP 3: Once Your License Transfer is Complete:** Notify your local Board of Realtors & MLS of your change. If you need any assistance, reach out to your [eXp State Broker](#).
- ☐ **STEP 4: Complete Our 'NEXUS Group Onboarding' Training** Go to [Belladonnariso.com/onboarding](https://Belladonnariso.com/onboarding). Click on "Get Started" and answer the questions to set up your access. This training will cover eXp Tools and Systems Bplus our Exclusive NAEA Tools and Systems.
- ☐ **STEP 5: Join the NEXUS Group Facebook Group:** You're part of the NEXUS Group family now! This page is a way for us to share, grow, and get to know each other as a group. We will also keep you updated on all of our events, workshops & masterminds! [CLICK HERE TO JOIN](#).
- ☐ **STEP 6: Transfer your listings to eXp with your MLS-** Contact your MLS for instructions first and then your state broker. State broker information can be found here [State Broker](#). Also make sure your MLS account shows eXp as your new Broker. Check out [eXp Connect - Getting Started Guide](#) for an overview of the next steps and continue to follow the steps below.
- ☐ **STEP 7: Helpful Resources:** Here are some helpful pages for you during your onboarding. [CLICK HERE](#). If at any point you need help, don't hesitate to reach out to your Sponsor or the exp onboarding department

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- ☐ **STEP 8: Order Signs** - Visit [EXP Marketing Center](#) for great materials including logo files. Be sure to follow the Guidelines found on this site and send a proof to your state broker and [marketing@exprealty.com](mailto:marketing@exprealty.com) for approval prior to ordering
- ☐ **STEP 9: Receive email "Activate Your eXp Realty Account" and set up forwarding**
  - Follow the instructions in this email to set up forwarding of your eXp email to your existing email address. Your email alias will be your user ID for all eXp systems.
  - \*Check your SPAM folder if not received within 24 hours from your license transfer. Completing this will activate the next steps.
- ☐ **STEP 10: Receive email "Welcome to eXp Realty - Your Passport Account"**

Passport...is a single sign-on system. Click the link to activate your Passport account and set up your password. Your Passport ID will replace the temporary guest account your received for eXp World. \*Check your SPAM/JUNK folder if not received within 24 hours from Step 9.
- ☐ **STEP 11: Take A Look At Your Enterprise Dashboard & Order Business Cards** -

Make sure you have attended the training for this platform first then [login here](#) and take a tour of your new dashboard to see everything that's available to you. For other marketing materials such as flyers, brochures, post cards, etc. eXp set up the [Marketing Center](#) where you can customize the base templates. and save.
- ☐ **STEP 12: Download Workplace and Workplace Chat to your phone and set up**

Workplace is an easy-to-use collaboration platform, a lot like Facebook built for the world of work. This is where we share best practices, keep up on company news and events and share referrals and more. On your computer set up a bookmark on your bookmarks bar, and on your phone move the app to the front screen. **Locate and join your state group! This is how you communicate with your Broker and team staff.** [How to manage notifications](#)

For Apple:

- [Workplace Download](#)
- [Workplace Chat Download](#)

For Android:

- [Workplace Download](#)
- [Workplace Chat Download](#)

# eXp Onboarding Checklist

- ☐ **STEP 13: Receive email: Activate Your eXp Realty SkySlope Account (Transaction Management Platform)** - Your ID will be your eXp email alias. This platform is used to report all your listings and purchase contracts to eXp. If you don't receive this email within a day of confirming your new eXp email address, click this link to set your password to access: <https://app.skyslope.com/ForgotPasswordNew.aspx?type=MW>
- ☐ **STEP 14: Set up your Regus Membership** eXp has partnered with Regus to provide you a global network of workspaces that enable you to work wherever you need to be, in a productive, professional environment. You need to sign up for your Regus Membership. Then you will have FREE access to Regus Business Lounges worldwide
- ☐ **STEP 15: Agent Starter Kit:** Watch for the email with links to your Agent Starter Kit. You will get a link to order 1000 business cards and 25 presentation folders at no charge!
- ☐ **STEP 16: Get Access to the NAEA Training:** Email [honeybadger@naea.com](mailto:honeybadger@naea.com) and request your login to the NAEA course.

## CONGRATULATIONS, YOU'RE FULLY ONBOARDED TO EXP REALTY!





# eXp Basic Training Classes to Take While You Are On-boarding

- ☐ **NOTE: Canadian Agents Only** - Stop by the Canadian Operations in eXp World to find out more about education classes designed just for you
- ☐ **Read eXp Realty Policies and Procedures** - [U.S. Policies and Procedures](#) / [Canadian Policies and Procedures](#)
- ☐ **Take a Guided Tour of eXp World** Take a guided tour of eXp World. During the tour you'll learn about each area inside of eXp World and how to best utilize this platform. Tour days and times are here: [eXp World Training Calendar](#)
- ☐ **Start the eXp FAST START Class Series and Add the Other Classes To your Calendar.** Self-paced training will guide you through getting started with eXp Realty. Go to <https://exprealty.mindflash.com/> to get started. (You can also take these classes live in the World.)
- ☐ **Download eXp World mobile app for IOS and Android** [Guide to Mobile](#)
- ☐ **eXp Enterprise Training / Your Dashboard for Everything eXp** This is where you can see your stock, revenue share, transaction history and more. [Click here to watch.](#) Make sure you watch this short video tour so that you can hit the ground running once you're onboard and have access. For more in depth training see the eXp Fast Start Series below
- ☐ **Transaction Management**  
Skyslope Basic Training - For dates and times see the [calendar](#). Download [Transaction Quick Reference Guide](#)
- ☐ **Basics of Accounting at eXp**  
Fee's, Revenue Share, and Stocks - For dates and times see the [calendar](#).
- ☐ **kvCORE - CRM Introduction**  
kvCORE is an optional FREE service to individual agents. This platform is your new CRM that includes a client-facing custom web site to drive leads to for lead capture, tracking and managing. Watch the Introduction videos below to become more familiar with the platform so you are ready to get started once you're onboard. Each video last 5-7 minutes. [Web Site and IDX](#), [Lead Engine](#), [Smart CRM](#), [Listings](#), [Transactions](#), [Marketing Autopilot](#), [Analytics](#), and [Marketplace](#).

# eXp Onboarding CheatSheet

Congratulations...you're now an eXp Agent! Here's a quick checklist just to make sure you didn't miss anything. Just like Santa, got a list and checked it twice!

Item	Completed?
Fill out the Join eXp Application Form & Sign ICA	
Join eXp World w/Guest Pass (Take the World Tour)	
Download fully signed Contractor Agreement	
Transfer real estate license with the Division of RE	
NEW AGENT ONLY: Join your local Board of Realtors	
NEW AGENT ONLY: Join your local MLS	
Update MLS & Transfer Any Active Listings	
Activate & Verify Your eXp Email Alias	
Activate Your eXp Passport Account (Replaces guest acct.)	
Activate Your SkySlope Account & Download Phone App	
Join eXp Workplace & Download Phone Apps	
Order Free Business Cards	
Open State Email and Save Important links	
Sign Up For Regus Membership Id	
Complete the <a href="#">Partner Fast Start Set Up</a>	

# eXp Resources & Links

**EXP Explore Guide:** Comprehensive online resource for everything EXP

<https://explore.exprealty.com/>

**EXP Passport:** Links to your eXp platforms.

<https://exprealty.okta.com>

**EXP Enterprise:** Your eXp Dashboard with all of your resources.

<https://www.expenterprise.com/>

**EXP Mindflash Fast Start Series:** Training for new agents

<https://exprealty.mindflash.com/>

**EXP World Download Link:** Your EXP virtual world where you access EVERYTHING!

<https://download.exprealty.com>

**Instruction on how to set up EXP World**

[https://drive.google.com/file/d/1zC\\_Td2m46g9PnRnsHW13YbHTtM9pC3GG/view](https://drive.google.com/file/d/1zC_Td2m46g9PnRnsHW13YbHTtM9pC3GG/view)

**EXP Support:** Need help? Here's your link to get answers or chat with EXP support

<https://support.expcloud.com>

**EXP Brand Resources: Logos, Business Cards, Etc (ORDER FREE BUSINESS CARDS HERE)**

<https://expcloud.com/brand-resources/>

**Sign Up For Regus Account:**

<https://app.hellosign.com/s/e167bd77>

**EXP Marketing Center: Listing & Buyer Presentations,** Social Media Posts, Flyers & Brochures, Personalized Videos, Letterhead, & MORE! Including Spanish marketing materials.

<https://www.expmarketingcenter.com/>

**Skyslope Transaction Management & digisign**

<https://app.skyslope.com/AgentHome.aspx>

**Skyslope Live Tutorials**

<https://support.skyslope.com/hc/en-us/categories/201506227-SkySlope-Tutorials>

**EXP Workplace:** This is the Facebook Workplace where you can talk to your State Broker, attend live and recorded trainings and get all types of fun info.

<https://exprealty.workplace.com/>

**EXP Agent Healthcare Plans**

<https://expagenthealthcare.com/>

**Agent Attraction Training & Resources:** Learn how to share EXP with other agents.

<https://www.agentattractiontraining.com/>

**My EXP:** Your revenue share tracking dashboard

[https://my.exprealty.com/rev\\_share/dashboard](https://my.exprealty.com/rev_share/dashboard)



# DON'T FORGET THE EXTRAS YOU GET FOR PARTNERING WITH US!

## **#TeamBelladonnaexp Private Facebook Group**

[CLICK HERE](#) to join the #Teambelladonna private Facebook group. We train live in the group on Wed and Friday at 11am MDT

## **Kevin & Fred's Workplace Community**

You will receive an email with access to this exclusive community! Kevin and Fred are Belladonna's sponsors and they best guys around! Get exclusive access to Kevin & Fred along with amazing training & guest speakers.

## **Honey Badgers Private Facebook Group**

This is a Secret group created by Real Estate Giants, Jay Kinder and Michael Reese. You must be 'friends' with your sponsor on Facebook BEFORE they can add you to this group. You will receive a notification that you've been accepted. If you don't see that notification follow up with your sponsor.

## **Access The NAEA Site**

This is Kay Kinder's and Michael Reeses exclusive National Associate of Expert Advisors training portal. Email [honeybadger@naea.com](mailto:honeybadger@naea.com) to get your login credentials. DON'T SKIP THIS! You will get access to thousands of dollars worth of training courses.

## **The Kevin & Fred Show**

Listen in as Kevin and fred bring you quick tips for business and interviews from Top Professionals for the real estate industry. They just had Gary Vee on for the 2nd time! Catch the podcast here: <https://kevinandfred.libsyn.com/>