



CHAMBERLAIN

— REALTY —



**Agent On-Boarding  
Workbook**



# WELCOME HOME!

Welcome to Chamberlain Realty LLC! As the broker-owner of the company I could not be more thrilled that you see the value in what we're bringing to the market. We are constantly striving to provide the best environment, tools, training and splits to help you thrive in your business. We hope that you truly come to life and see your business grow in every way you dream of it growing.

Now that's you've made the switch, we've got a ton to show you so get ready. **Here's what we'll be covering:**

- Transfer Docs
- Sign Up Docs
- Back Office
- CRM & Leads
- Social Media
- Email
- Listing Presentation
- Agent Materials
- MLS
- Listing Launch
- Apps

# TRANSFER DOCS

Have you filled out all these docs and turned them into their appropriate places? You can find all of these documents for download at [chamberlainrealtyllc.com/onboarding](http://chamberlainrealtyllc.com/onboarding)

## OREC Docs Needed

### Transfer or Activate License For Real Estate Associate

- Use the [OREC.OK.GOV](http://OREC.OK.GOV) current licensee portal to transfer brokerages.
- Get a check or request an online payment link for the transfer fee to OREC.
- Your old broker is responsible for e signing your release form through the [OREC.OK.GOV](http://OREC.OK.GOV) portal.
- If you can't get into the portal just email [info@orec.ok.gov](mailto:info@orec.ok.gov) or go in person at 1915 N Stiles Ave Ste 200, OKC.

## MLS Docs Needed

### MLS Subscriber Agreement

- Tell the MLS you joined Chamberlain and they'll email you docs to e sign.

### MLS Listing Transfer Form

- Only if you currently have listings and need to move them over, download the doc with my signature from the onboarding site. Your releasing broker must sign this as well and Chamberlain. Email to [membership@okcmar.org](mailto:membership@okcmar.org)

## BOARD OF REALTORS Docs Needed

Contact your board of Realtors and they'll send you forms to fill out. (Note Chamberlain is a member of Norman, OKCMAR, Edmond and Tulsa, you only need to be a member of one)

# **SIGN UP DOCS**

These are internal documents between you and Chamberlain Realty LLC. We will send these to you to E Sign. Please read through and sign each of these documents.

## **Agent Commission Form**

- This document describes in detail the commission plans and allows you to communicate which plan you'd like to choose. And if choosing a monthly paid plan you are able to provide payment information

## **Policy Manual**

- This is Chamberlain Realty LLC's general policy manual. The last page has a section for you to sign acknowledging you received the manual.

## **Independent Contract Agreement**

- This is an agreement between you and Chamberlain acknowledging the general working protocol and agreements of our contractor relationships

## **Agent Conduct Agreement**

- This is an agreement between you and Chamberlain expressing public behavioral expectations. In short we want you to be a true professional and represent Chamberlain in all your public interactions.

## BACK OFFICE

This is how we manage our documents and be sure we're fully buttoned up and safe in case of an audit or lawsuit.

### Broker Mint

- Brokermint is an online software similar to Back Agent or Dot Loop. It's where you can see what documents are needed for various transactions, and then upload and store saved documents. It allows those documents to be reviewed for accuracy. And finally it allows you to create your own Commission Disbursement Authorization Form (CDA) to send to your title company just before closing so they can get you paid!
- Be sure your managing broker creates your new Broker Mint account
- Watch the online video tutorial at <http://support.brokermint.com/webinars-and-training/agent-training>
- Set up a practice transaction and start learning the system. Run through a buyer side and listing side start to finish. Ask questions if you have any questions at all.

# CRM AND LEADS

We're using some of the VERY BEST platforms in the industry to help you close more deals! We're excited to teach you about them.

## Follow Up Boss

- Follow Up Boss is our Customer Relationship Management system (CRM). It's where all your contacts and leads go and it helps you not lose contacts or drop the ball in terms of following up with them. It allows you to set up a lot of automation to help keep up with people well. It can text from the system, email and call. It's fantastic at keeping track of everything and helping you stay focused on your lead follow up on a day to day business, even when you're on the run.

- Be sure your managing broker creates your new Follow Up Boss account

- Watch the online video tutorial at <https://www.followupboss.com/daily-use/>

- Set up some practice leads and text and email them. Import your client list and set them up for follow up.

- Be sure you've downloaded the Follow Up Boss app on your phone and set up your accounts

## Ylopo

- Ylopo is our website provider. They do our search website and they help provide facebook leads and campaigns. They are on the cutting edge of using artificial intelligence inside of Facebook to get leads the info they really want. Ylopo partners with Follow Up Boss and all of their info goes back and forth between the two platforms.

- Be sure your managing broker creates your new Ylopo account and your agent landing page

- Watch the online video tutorials sent directly to you from Ylopo

- Sit with your mentor to learn Ylopo listing edits for your clients.

## **SOCIAL**

Let's update your info tell the world!

Update your personal and business pages with the brokerage change. Update your email address and website. Be sure you put your license number and your brokerage info in the About Me sections. Go through and delete any older posts you have of your old brokerage logo's or info, if appropriate.

Facebook

Instagram

Twitter

Linked In

## **EMAIL**

Email [admin@chamberlainrealtyllc.com](mailto:admin@chamberlainrealtyllc.com) to confirm or set up your email.

Set up an auto response on your old email address that let's people know about your new address, and forward those emails to your new address

Export your contacts to upload to your new email address

# LISTING PRESENTATIONS

One of Chamberlain Realty's main goals is to provide some of the best listing services in Oklahoma. We've got a few tools and a lot of standards for you to check out for you future listings.

## Seller's Report via Ylopo

- Before a listing, take time to plug in the sellers info on Ylopo Stars and get a seller report to see how many active buyers we have in the system looking for what they have to offer.
- Watch the process
- Make a practice seller report

## Comparative Market Analysis

- This is the market analysis showing what the homes around the subject home sold for in the last year.
- Have your mentor show you how to run a CMA
- Practice getting a CMA ready for a listing

## Documents

- Practice getting the contracts ready for a listing presentation
- Download and learn the Chamberlain Listing Presentation Checklist Doc



# AGENT MATERIALS

Depending on the commission plan you chose, Chamberlain will be providing you a TON of materials to help boost your business.

Check the boxes as each are explained to you and let us know if you're missing anything along the way!

- Agent Landing Page with search lead capture via our ylopo site
- Headshots- Contact Logan Bacon- 405-465-7077
- Business Cards (once ordered we will reimburse you \$30 per year, just email [admin@chamberlainrealtyllc.com](mailto:admin@chamberlainrealtyllc.com) to request reimbursement.
- Brochures
- Property For Sale Signs- we have a stash of them ready to go at the office. You just need a 18x6" sign rider with your name on it and number.
- Open House Signs- we recommend using many each open house. We have a stash at the office. Bring them back after each open house.
- Directional property for sale signs- these are plastic signs that are to be placed at the busiest road near your listings, pointing the way to the home. One per listing. At the office, return when sold.

## **MLS SET UP**

OKCMAR is the MLS system for the OKC area. GTAR is the Tulsa MLS System. There's a lot to learn from the Matrix, Showing Time, Real List and Transaction Desk apps inside of the Mls agent page. Each of these programs is critical to your success as an agent. If you need training on these please don't hesitate to ask and we'd be happy to help.

## **LISTING LAUNCH**

When you get ready to have your first listing with Chamberlain, there's a lot that's expected. It's too much to go over here but have your mentor go over the checklist with you to start wrapping your mind about what's expected.

# APPS



As you know our cell phones are critically important in this industry. Here are some apps we use on a regular basis we'd like you to know about:

- Follow Up Boss
- Showing Time
- MLS Touch - if in OKCMAR MLS
- MLS Login
- CTO Agent3.0
- IScanner
- Google Drive
- Taxbot
- Air table
- Premier Agent
- E Key
- Typorama
- Videoleap

# OFFICE INFORMATION

**Chamberlain Realty LLC license number is 177929**

**Company phone number 405-300-0543**

**The main company address with OREC is**

**2900 S Telephone Rd Suite 100 Moore OK 73160**

**Moore Office address**

**2900 S Telephone Rd Suite 100 Moore OK 73160**

**NW OKC Office address is**

**4801 Gaillardia Parkway, Suite 215**

**Oklahoma City OK 73142**

**S Tulsa Office address is**

**7804 e 108th st s**

**Suite C #211**

**Tulsa, ok 74133**

**Tulsa Office phone number**

**+1 (918) 290-9399**

**Tulsa Branch Lic Number 185526**

**Mike Baxter is the Tulsa branch broker**

**(918) 933-9995**

**mike@chamberlainrealtyllc.com**

**Chamberlain EIN tax ID 82-3195768**

**Cole realty resource**

**login gwortman123**

**12345**

**HudHomeStore.com**

**chamberlainrealtyllc! is the user name**

**Chamberlainrocks18! is the pass**

**Office Number and Hotline for Broker Support or Tech Support**  
405-300-0543 or 918-290-9399

**Font for Chamberlain logo**  
Trajan Pro Bold

**Designer of Chamberlain's logo was**  
lineandcircle on fiverr.com

**Broker Owner's Email**  
[Grant@chamberlainrealtyllc.com](mailto:Grant@chamberlainrealtyllc.com)

**Website**  
[Chamberlainrealtyllc.com](http://Chamberlainrealtyllc.com)