

Launch Checklist

As you begin your journey with eXp Commercial, please utilize this checklist to guide you through getting started. Please be aware that the eXp Commercial team is here to support you every step of the way.

Week 1 Action Items

Completed

Access [eXp.World](#)

Visit and explore the eXp Commercial Main Lobby by utilizing the link above. Here, you can speak to our concierge, brokers, or contract compliance to assist with any questions you may have.

Log in to [Workplace](#) on your computer

Search and join your state group and those relevant to your product type specialty. Other important groups you'll want to join include:

- [eXp Commercial](#)
- [eXp Commercial Certified Agents](#)
- [eXp Referral Network](#)

Familiarize yourself with [eXp Enterprise](#)

You will refer back to this many times over your career with eXp Commercial.

Log in to [SkySlope](#)

Keep an eye out for a welcome email from SkySlope, eXp's transaction management system, containing your login credentials.

Click [here](#) to learn how to use the platform.

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Week 1 Action Items (cont'd)

Download [AIRCRE](#) software.

AIRCRE provides eXp Commercial advisors with free access to a unique application of commercial real estate contract templates, including purchase and sale, lease, and listing agreements.

Discover [Moody's Analytics CRE](#).

Moody's Analytics CRE offers integrated insights, analytics and enriched data to CRE professionals. Built on trusted, validated data, dynamic analytics and extensive research programs, Moody's Analytics CRE helps institutions gain efficiencies and drive growth in CRE.

- Review [this FAQ](#) for more information.
- Sign up for Moody's Analytics CRE using [this form](#).

Choose your market research tool.

You will need to make a selection between the following three tools:

- [Buildout](#)
- [RealNex](#)
- [Business Broker CRM](#)

Make your selection [HERE](#).

Please understand that you are only able to choose one.

Please note: Buildout syndicates to the eXp Commercial experts page. If you choose to use RealNex or BusinessBrokerCRM, you will not appear on the eXp Commercial website.

Additional Opt-In Tools

Use your eXp Commercial email address to create a free account on the following platforms:

- [TenantBase](#)
- [Brevitas](#)
- [theBrokerList](#)

Completed



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Week 1 Action Items (cont'd)

Review and complete the eXp Commercial Academy [Agreement](#)

The eXp Commercial Academy is a two-week training program for all eXp Commercial advisors who have closed three or fewer transactions in their career. Our seasoned advisors set you up for success by teaching you the fundamentals of commercial real estate and pairing you with a mentor.

Please register for the course [here](#) after you have signed the agreement.

Setup your eXp email

Your eXp email is an alias, which means it automatically forwards to the personal email account you designated when joining.

If you have Gmail or Yahoo, you may follow the instructions below to ensure your emails are sent from your eXp email address. [Gmail](#) | [Yahoo](#)

Create your email signature.

This is where you can provide helpful contact information and useful links. Ensure you add a shortened version on your mobile devices.

EXAMPLE:

Sally Sunshine



eXp Commercial, (title)

(331)111-1111

sally.sunshine@expcommercial.com

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Week 1 Action Items (cont'd)

Completed

Set up your Voicemail

Your voicemail box is a way to assure your clients that they've reached the right person and that you've received their inquiry and will follow up with them.

EXAMPLE:

"Hi, this is Sally Sunshine with eXp Commercial. I am away from the phone right now, but please leave a detailed message with your name and phone number, and I will get back to you as soon as possible. Thank you and have a great day!"

Review the eXp Commercial [Training Calendar](#)

Add it to your calendar by selecting the + in the bottom right-hand corner.

Connect with your state broker!

Reach out to your state broker for any transaction or state-specific questions

State broker email addresses follow the format:

st.broker@expcommercial.com. For example, the Alabama state broker email address is al.broker@expcommercial.com.

Join a Product Specialty Committee

Plug into a product specialty committee specific to your niche and attend associated meetings for education, insights and referrals.

[Sign up today!](#)

Interview and select a mentor. (if applicable)

Set up a meeting cadence with your new mentor. Complete [this form](#) for a full list of eXp Commercial mentors.

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Week 2 Action Items

Completed

Create your [Mentee Program Tracker](#)

Follow along with this [video tutorial](#). The point of the mentee program tracker is to equip you with updates when meeting with your mentor and ensure you're on track to achieve your business plan goals.

Establish your business plan

Use this [2024 Success Roadmap](#) as a template and set quarterly reminders to track your progress.

Determine the farming territory specific to your geographic region and product specialty

A few tips for successfully completing this step include:

- Research 100 properties in your product type and territory weekly.
- Visit those properties – physically observe and make notes of the good and bad features.
- Add these properties and the ownership information to your database.

Keep in mind that finding “true owners” is crucial. You're not looking for the LLC name but the individual you will contact. Try to determine if they syndicate other properties, what properties they've purchased or sold in the past, if they volunteer to a cause, and what you can use to build a rapport with them.

Keep an eye on your market

Look daily for any properties that are new to the market, under contract, and just sold. You must know your market.

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Ongoing Action Items

Completed

Build your database

Build and maintain a list of at least 1,000 properties/owners. (or whatever the academy is telling them the number should be).

Get to know eXp agents in your area

The referral network is one of the best-kept secrets at eXp. Getting to know the eXp Realty agents in your area opens the door for more connections and more business.

Practice cold calling with your mentor

Rehearse cold calling until you've perfected your presentation. You must be able to accurately and efficiently build client presentations, create purchase contracts, and enter transaction data in Skyslope to have success with this method.

Get to know your competition

The brokers in your geographic region and product type are your competition but also your base for referrals. Learn about the deals they're closing, what properties they've sold, and what price each one was listed and sold for. Research their marketing and presentation tools and see what they're doing to reach clients.

Visit the eXp Commercial [Marketing Center](#)

This is where you can find business cards, logos, brand guidelines, marketing materials and more.

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Ongoing Action Items

Visit the eXp Commercial [Experts Page](#)

This is where you can find other eXp Commercial advisors throughout the U.S. and in a variety of product types. You will appear on the page after you have completed your Buildout profile.

Update your personal and professional information

Review your social media accounts to confirm they're updated with your new title and contact information. Keep in mind this will be one of the first things someone looks at when they're considering you for their listing. Ensure it reflects the character you want potential clients to see.

Position yourself as a thought leader

Build a professional website and create valuable content that shows clients you're knowledgeable about the industry and market. Content ideas include a blog, newsletter, YouTube channel or podcast.

Create and use a marketing plan.

Feel free to utilize [this](#) best practices outline provided by Sharp Launch.

Plan your days and hold yourself accountable.

Follow these tips and you will set yourself up in having a successful career as an eXp Commercial advisor.

Completed

Congratulations and Welcome to