



# Onboarding Process

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Presented by: Realeflow eXp Organization

# Getting started

Here is a summary of the steps involved in joining eXp Realty:

- [Submit application and Independent Contractor Agreement \(ICA\)](#)
  - [Not quite ready to join? Submit Letter of Intent \(LOI\)](#)
- Approval of application and ICA by eXp
- [Transfer of your license to eXp](#)
- [Activate your eXp Passport and email alias](#)
- [Activate your SkySlope account](#)

Each of these steps are discussed more fully in the upcoming slides.



# Good to know

eXp's primary method of communication during the onboarding process will be email. While you are applying / onboarding, we suggest that you routinely check your spam / junk email folders, as various spam / junk detection software routinely sends eXp's onboarding emails to those folders by accident. This is especially true for Gmail accounts and / or vanity domains.

The entire onboarding process can take up to 48 hours or more depending on the parties involved, and the accuracy of information provided by the applicant.

On the right side, we will guide you through the steps with a traffic signal, indicating when you should proceed to the next step (green light), and when you should stop and wait for further instructions from eXp (red light).



# Questions during onboarding?

## Individuals

General questions: [agentonboarding@exprealty.net](mailto:agentonboarding@exprealty.net)

Specific questions by geographic area:

Eastern: [easterncareers@exprealty.net](mailto:easterncareers@exprealty.net)

Central: [centralcareers@exprealty.net](mailto:centralcareers@exprealty.net)

Western: [westerncareers@exprealty.net](mailto:westerncareers@exprealty.net)

## Teams

General team questions: [teamservices@exprealty.com](mailto:teamservices@exprealty.com)

Specific team questions by geographic area:

Eastern: [teamonboarding.east@exprealty.net](mailto:teamonboarding.east@exprealty.net)

Central: [teamonboarding.central@exprealty.net](mailto:teamonboarding.central@exprealty.net)

Western: [teamonboarding.west@exprealty.net](mailto:teamonboarding.west@exprealty.net)

For questions requiring a more immediate answer, you can always visit the appropriate department in eXp World, our virtual office. See below for details.



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# Steps 1 & 2 - Submit application and ICA

NOTE - Submitting the Application and ICA to eXp Realty doesn't automatically switch your brokerage. You must take affirmative steps to transfer your license to eXp Realty (see below).

There are two ways to apply to become an agent with eXp:

1. Get a link from your sponsor.
  - Example: <https://erikasingleton.exprealty.careers>
2. Go to [join.exprealty.com](https://join.exprealty.com)



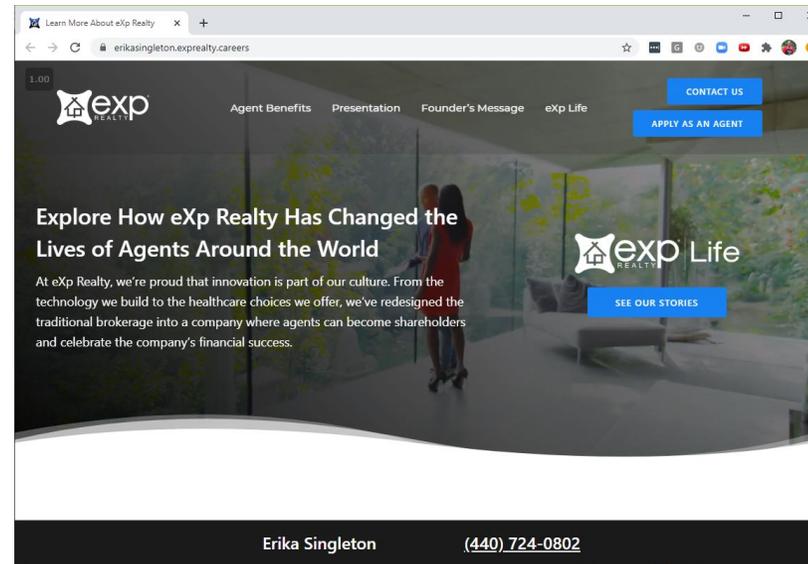
# Steps 1 & 2 - Application and ICA - continued...

When you open the link, it will take you to a page to sign up.

If you are joining the Realeflow organization, "Erika Singleton" should appear on the screen. Otherwise your sponsor's name should appear.

Scroll down the page to learn more about eXp.

You will also find a downloadable Google Slide deck entitled [An Introduction to eXp](#) that provides a good summary about the company.



# Steps 1 & 2 - Application and ICA - continued...

When you're ready to begin your application, click on:

"Apply Now as an Agent"

This will take you to this screen

Fill out the information.

Then click "Sign Up!"



**eXp Realty Application**  
We can't wait to work with you!

Thank you for your interest in eXp Realty, the largest residential real estate company by geography in North America! **To begin, simply fill out the information below.**

First Name  Last Name

Your email

Confirm your email

Cell phone number  Country

**SIGN UP!**



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# Steps 1 & 2 - Application and ICA - continued...

After you click "Sign Up" you will receive an email from eXp titled:  
**"Item 1: Activation - eXp Access to World and Join App"**

A few things are covered in this email:

**Application:** You will receive a guest account to login and complete your Online Application and the Independent Contractor Agreement (ICA). These must both be completed to continue with the onboarding process.

**eXp World:** You will also receive instructions on how to download and login to eXp World - eXp's online virtual campus / office. In the World, you can do a multiple of things, including but not limited to:

- Visit all the various departments in the company to get questions answered - good for time sensitive questions.
- Take training classes.
- Meet with your State Broker.
- Network with eXp agents all over the world!

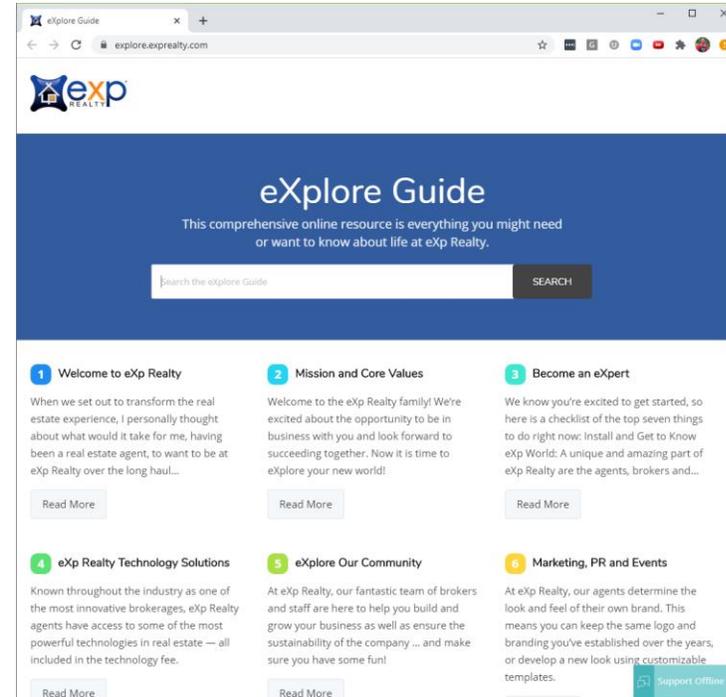
We highly recommend that you take a tour of eXp World and start to familiarize yourself with it. To schedule a tour of the World with eXp staff, email [expdocent@exprealty.com](mailto:expdocent@exprealty.com).



# Steps 1 & 2 - Application and ICA - continued...

Once you have activated your guest pass, you will be able to access the [eXplore Guide](#).

It's a great place to learn about eXp and get a lot of your questions answered.



# Steps 1 & 2 - Application and ICA - continued...

## Notes about the Online Application:

- Make note of your onboarding reference number. You will be given a link and a personal code to track the status of your application / onboarding progress (see below).
- Please allow around 30 minutes to complete the Application and ICA (discussed below).
- **When to Fill it Out:** We recommend you fill out the application during business hours. There is a live chat feature to get questions answered, but it's only functional during business hours.
- **What you need:** You will need the following to complete the application:
  - Bank account info - account where you would like payments to be made (commissions, revenue share, etc.)
  - Credit / Debit card info - will be used to pay your monthly fees
  - Corporation info - if you will be paid as a corporation
  - License number



# Steps 1 & 2 - Application and ICA - continued...

## Notes about the Online Application - continued:

**Your Name:** You will have to fill out your application with your full legal name (whatever appears on your license). If you commonly go by a nickname (e.g. "Chris" instead of "Christopher") you can change this later in your profile.

**Your Sponsor:** You will be asked who your "sponsor" is. If Realeflow has been the most influential in your decision to join eXp Realty, you will select "**Erika Singleton**". If you selected the link in the email you were sent, "Erika Singleton" should auto-populate here. If not, search for Erika Singleton in the state of OH. Make sure you select the right name - eXp has a strict policy that once a sponsor is selected, it cannot be changed for any reason.

**Agent Equity Program:** During the application process, you will be asked if you want to participate in the Agent Equity Program. This is one of the key benefits of joining eXp Realty. eXp Realty is a publicly traded company on the NASDAQ (ticker: EXPI). You have the option to have 5% of each commission check go towards the purchase of stock on your behalf at a 10% discount off the 30-day market average. *Note - if you are not prepared to select this option now, you can always do it later.*



# Steps 1 & 2 - Application and ICA - continued...

## Notes about the Online Application - continued:

### **New Agents:**

- If you are a new agent, when it asks for your MLS number and previous broker, select "other"
- Note that new agents are required to participate in eXp's Mentoring Program.



# Steps 1 & 2 - Application and ICA - continued...

## Notes about the Online Application - continued:

### Teams:

- **Team Leaders** - During the application process you will be asked which “type” of team you have: Self Organized, Standard, or Mega Icon Team. For a description of each type of team and the associated requirements [click here](#).
- **Team Members** - During the onboarding process you will be asked if you are joining eXp as part of a team. Provide them with your team leader’s name.
- **Team Agreement** - If you are joining eXp as part of a team, you will be asked to sign a “Team Agreement” with eXp. This is a separate agreement from the one you sign with your team leader. It confirms for eXp that you are on a team and are required to give **at least** a 25% split to your team leader. The reason eXp requires this is because if you are on a team, you get a reduced cap (\$8,000 as opposed to \$16,000).

**Questions?** Contact [teamservices@exprealty.net](mailto:teamservices@exprealty.net)



# Steps 1 & 2 - Application and ICA - continued...

## Independent Contractor Agreement (ICA)

Once you have submitted your online application, you will get an email from eXp Realty (most likely through "Hello Sign" which is similar to DocuSign with your ICA for signature.

We highly recommend that prior to signing the ICA, you print out a copy and thoroughly review it.

If you have questions about the ICA, go into eXp World and go to "Agent Transitions (onboarding)". There you will be able to ask questions directly to an eXp staff member.



# Steps 1 & 2 - Application and ICA - continued...

## Letter of Intent

If you're committed to joining eXp Realty, but are not quite ready to make the switch, you can submit a Letter of Intent (LOI) to eXp.

*This of the LOI as a place-holder for you at eXp while you're preparing to make the transition.*

The main benefit of submitting an LOI is that it allows you to begin recruiting agents into eXp (i.e. building your downline) before you have officially moved over.

*For example, if you are a broker and you want to start moving your agents over before you are ready to close your brokerage, you can submit an LOI, and begin moving your agents to eXp while you are winding things down. You will not be able to collect revenue share from agents you recruit until you yourself join eXp, but you will not lose the opportunity to bring people in under you while you are getting your ducks in a row.*



# Steps 1 & 2 - Application and ICA - continued...

## **Letter of Intent - continued**

To submit a Letter of Intent, first review [eXp's LOI Policy and Procedures](#), then click on the link contained therein and it will take you to a [Google form](#) to fill out.

After you fill out the Google form, eXp will send you the actual Letter of Intent to sign through HelloSign (like DocuSign). After you sign it, you will receive a fully executed copy for your records.

Once accepted, the LOI is good for 90 days. You must transfer your license within 90 days of submitting your LOI.

When submitting an LOI, please note that you will also have to submit the online application to eXp and your ICA, but you will not actually switch to eXp until you affirmatively transfer your license (see below).

Have questions about the LOI? Email [LOI@exprealty.com](mailto:LOI@exprealty.com)



# Steps 1 & 2 - Application and ICA - continued...

## **Cap Deferment Policy**

If you are hesitant to join eXp right now because you are currently at a brokerage with a cap and you have already capped for the current period, do not let that stop you - eXp will honor your cap period, and you will not start paying a split to eXp until that anniversary date!

Review the [Cap Deferment Policy](#).

Click here for the [Cap Deferment Application](#).



# Steps 1 & 2 - Application and ICA - continued...

**Congratulations - you have finished Steps 1 and 2. STOP after these steps.**

Once you have completed the application, eXp will send you an email telling you that your application has been received.

The email will give you a link to track your onboarding status (you will receive a personal code).

**Note to Team Leaders** - you should get a personal code from any agents on your team so that you can track their onboarding status as well.

The email will give you email addresses to reach out should you have any questions.



## Step 3 - License Transfer

Once your application is complete and has been accepted by eXp, the next step in joining eXp Realty is to transfer your license. You will not be a part of eXp until YOU do this.

The process to transfer your license varies from state to state.

You will receive an email from eXp telling you to reach out to your State Broker to initiate the license transfer process. For a list of all State Brokers and their contact email [click here](#).

You will then receive an email from your State Broker with specific instructions on how to transfer your license.



# Step 3 - License Transfer - continued

## **IMPORTANT Note RE: Your Main Office Address**

The license transfer instructions from your State Broker will tell what to fill in for your mailing address and/or your “main office address”. Since eXp is a cloud brokerage (no brick and mortar offices), by default your main office address will be the address of your State Broker. This might be inconvenient if your State broker is not in the area where you practice.

If you want to use a different address than your State Broker’s as your main office address, you have two options:

1. If you have your own office, you can have it designated as an eXp branch office.
2. If there is a designated eXp office in your area, you can get permission from the “manager” (owner) of that office to use their address as your main office address. You will have to provide the owner/manager with your DRE number and be added to their list of authorized users of that branch office.

There are specific requirements that must be met to exercise either one of these two options. Contact your State Broker for details.



# Step 3 - License Transfer - continued

## **BEFORE you transfer your license, be sure to do the following:**

- Review your Independent Contractor Agreement (ICA) with your current broker:
  - What happens with the following:
    - Open escrows
    - Current listings
    - Signed Buyer-Broker agreements
    - Open referrals
  - If they gave you money to join that brokerage, do you have to pay it back?
  - Do you have a non-compete and/or non-solicitation clause?
- Empty your personal effects from your office and/or desk
- Get everything off your current brokerage's server:
  - Contacts
  - Emails
  - Calendars
  - Documents & contracts
  - Photos
  - Etc.
- Notify your clients that you will be switching brokerages
- Notify your eXp State Broker that you will be transferring listings and/or buyer-broker agreements so they can get the paperwork started



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## Step 3 - License Transfer - continued

Once you have taken the necessary steps, your State Broker will reach out to your state's DRE and accept your license.

**URGENT:** Once you transfer your license, you need to update your Realtor Association / MLS with eXp Realty as your broker IMMEDIATELY. If you do not, you will lose MLS access.

If you have any questions or issues during this part of the process, reach out to your State Broker directly.

**Please Note:** Transferring your license is NOT the last step in the onboarding process. Once your license is transferred, you will receive additional emails from eXp which will tell you what to do next (see below). Be sure to complete these steps to complete your onboarding process.

After you have transferred your license, be sure to transfer your listings and/or buyer-broker agreements. First contact your MLS for instructions, then contact your State Broker.



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## Step 4 - Verify Email Alias

The next step in the process will be to verify your forwarding email address.

All communications from eXp are done to your eXp email address, AKA your "email alias" - for example - [Erika.singleton@exprealty.com](mailto:Erika.singleton@exprealty.com).

eXp will send an email to the email address you provided in your application with a link to verify your email address.

Verifying your personal email will activate your account at eXp and will allow you to send and receive emails from your @exprealty.com email alias.

Once you verify your forwarding address (your personal email) all emails sent to your eXp Realty email will automatically be delivered to your personal / preferred email address.

To send email as your eXp Realty alias, visit the [Knowledge Base](#) in eXp Enterprise.



## Step 4 - Verify Email Alias - continued

### CONGRATULATIONS!!

Once you verify your email address, your account will be activated, and you will officially be a part of eXp.

Please note however that you will receive some additional emails from eXp with some additional steps to take - see next slide:



# Step 5 - Welcome & Passport Account

eXp uses a secure, single sign-on system called [eXp Passport](#). You will use your Passport password to sign into virtually everything in eXp's universe (eXp Enterprise, Workplace, etc.)

You will receive an email from eXp with the following:

- A link to activate your Passport account
- Your username, which will be your eXp email address
- Links and email addresses to get help
- Links to various eXp resources to help you get acclimated once you are on board

If you experience difficulties with your Passport account, send a help request to the eXp Tech Support team using this link: <https://support.expcloud.com/portal/newticket>



# Step 6 - SkySlope

SkySlope is an industry leading transaction management system which is used by eXp, and is included as part of your \$85 / month technology fee.

All files / documents for all transactions are kept and managed in SkySlope. *You will have to upload file documents and commission info in order to get paid.*

You will get an email from eXp to activate your SkySlope account - the email will include:

- A username and a link to create your password
- Information on how to get started using SkySlope, including video tutorials



# Next Step - Business Cards

One of the benefits of joining eXp is that they provide you with your first 1,000 business cards for free!

You will get another email from eXp to order your business cards.

You can choose from one of their templates or provide your own design.



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# WELCOME ABOARD!

Once you are officially an agent at eXp, you are going to have a lot of information to absorb and many new resources at your disposal.

If at any point you begin to feel overwhelmed, take a deep breath, and know that there is plenty of help available to get you through.

We will also be sending you our Guide to eXp which will give you a checklist of things to do once you are an eXp agent, and a roadmap to help you navigate your new brokerage.

If you have questions after you are onboarded, you can contact the following:

- Individuals: [agentservices@exprealty.net](mailto:agentservices@exprealty.net)
- Teams: [teamagentservices@exprealty.net](mailto:teamagentservices@exprealty.net)

