

Brokerage Orientation Checklist

<input type="checkbox"/> Staff Services	What services, such as reception and office management, are available during normal business hours? Who is responsible for these services?
<input type="checkbox"/> Desk Space	How is desk space allocated? What fees apply (if applicable)?
<input type="checkbox"/> Mobile Devices	Does the brokerage provide a mobile device? If a mobile device is provided, are there any restrictions on its use? Does the brokerage provide any assistance with associated costs such as monthly payment plans and usage charges? Who is responsible for any overages?
<input type="checkbox"/> Office Equipment	What office equipment is available to use at the brokerage? Common examples include black/white printer, colour printer, black/white photocopier, colour photocopier, telephone, and fax machine. Are real estate professionals responsible for any associated costs for using this equipment? How are these costs allocated (e.g. card or code access, credits)?
<input type="checkbox"/> Office Supplies	What office supplies (e.g. notepads, pens, printing paper) are provided by the brokerage?
<input type="checkbox"/> Computer and Software	Does the brokerage provide a computer (laptop or desktop) for each real estate professional to use while at the office? If yes, what software is installed? If real estate professionals are required to bring their own laptops, what programs best align with systems in use at the brokerage?
<input type="checkbox"/> Email	How is email communication handled in the brokerage? Is each real estate professional given a private email address or is there a shared account? Is there a shared inbox?
<input type="checkbox"/> Internet	What internet access is provided at the brokerage? Which Wi-Fi account should be used by real estate professionals and by their visiting clients?
<input type="checkbox"/> Postage/Courier	How are postage and courier costs handled for single and bulk mailings?
<input type="checkbox"/> Website and Social Media	Can real estate professionals use the brokerage website for promotion and advertising? Can links to real estate professionals' own websites be added to the brokerage website? Can real estate professionals post to the brokerage's social media accounts or are they required to have their own accounts? Is the real estate professional responsible for any costs associated with using the brokerage's website and/or social media? What relevant policies and procedures are in place, such as cybersecurity, brokerage branding, image use, and acceptable content?

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<input type="checkbox"/> Business and Office Hours	<p>What are the brokerage's regular office hours? Is office duty time allocated by the brokerage? What is the schedule, and are there any specific procedures that must be followed?</p>
<input type="checkbox"/> Office Access and Security	<p>Is the real estate professional given a key, access card, fob, or door code? How is the building accessed outside of regular hours? What guidelines does the brokerage have regarding personal safety when listing and showing property?</p>
<input type="checkbox"/> IT and Cybersecurity	<p>Is there a shared network drive? If working outside of the office, can real estate professionals access the network, software, and/or office computer? Can real estate professionals transfer files back-and-forth between their personal computer and a brokerage computer using email, a flash drive, Cloud services, Dropbox, or other means? Does the brokerage have a cybersecurity policy? What websites and/or activities are prohibited?</p>
<input type="checkbox"/> Property Listing Database/Trade Association Membership	<p>What forms must be completed and what costs are involved? Are renewals required? Who is responsible for associated application, renewal, and processing costs?</p>
<input type="checkbox"/> For Sale Signs, Frames, and Installation	<p>What does the brokerage provide in terms of for sale signs? What about custom commercial signage? What costs are involved for sign installations?</p>
<input type="checkbox"/> Business Cards	<p>Are business cards supplied? If not, what branding and design standards must be adhered to when ordering cards?</p>
<input type="checkbox"/> Advertising	<p>What standard advertising formats are used by the brokerage? What costs apply, and who is responsible for these costs? How are classified advertisements processed by the brokerage?</p>
<input type="checkbox"/> Promotional Pieces	<p>Does the brokerage supply any promotional items (e.g. pens, hats, water bottles) or make them available for purchase? If so, what items are available?</p>
<input type="checkbox"/> Forms	<p>What commercial forms (including listings, agreements, trade record sheets, and supporting forms) are provided by the brokerage and at what cost?</p>

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<input type="checkbox"/> Working with Sellers	What commercial forms are used, and what procedures are followed for their completion when working with sellers as clients and customers (prospective clients)?
<input type="checkbox"/> Working with Buyers	What commercial forms are used, and what procedures are followed for their completion when working with buyers as clients and customers (prospective clients)?
<input type="checkbox"/> Listings	How are listings processed internally within the brokerage, and what assistance is provided? What approval process and related procedures must be followed? What costs, such as administrative fees, are the real estate professionals' responsibility?
<input type="checkbox"/> Contracts	How are contracts prepared in the brokerage for presentation and possible acceptance? What software is used? How can real estate professionals be sure the contracts contain the most up-to-date clauses?
<input type="checkbox"/> Negotiations	How are multiple-offer situations handled? What steps are taken when processing deposits? What other circumstances and procedures should real estate professionals be aware of, such as buying and selling for personal purposes?
<input type="checkbox"/> Transactions	How are accepted purchase contracts processed in the brokerage? What administrative or other brokerage fees (if any) apply that have not already been identified in this checklist?
<input type="checkbox"/> Privacy	In addition to provincial and federal privacy laws, such as the <i>Personal Information Protection and Electronic Documents Act</i> (PIPEDA) and Canadian Anti-Spam Legislation (CASL), what is the brokerage's privacy policy? What specific provisions apply to the activities of real estate professionals? Is there a privacy brochure?
<input type="checkbox"/> Office Meetings	Are there regularly scheduled office meetings? Is attendance mandatory?
<input type="checkbox"/> Training	What training is provided by the brokerage, and what costs (if any) are borne by real estate professionals?
<input type="checkbox"/> Referrals	What procedures apply when making referrals?