



# New Agent Onboarding Checklist

*Welcome to  
NextHome!*

## Step 1: Access your NextHome Intranet account

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Once your Broker has successfully added you to the roster, you will receive an email titled “Welcome to NextHome” from [memberservices@nexthome.com](mailto:memberservices@nexthome.com). Within this email, you will be provided with a unique username and temporary password that you will use to access the NextHome Intranet.

To access the NextHome Intranet, please go to [NextHome.com](https://NextHome.com) and click on the “Login” link in the upper right-hand corner. Enter the username and password you were provided to access your new NextHome profile.

If you did not receive the welcome email containing your login credentials, please contact your Broker or NextHome’s Member Services team to request your login information be resent.

The Member Services team is available to help with any system-related questions. They can be reached Monday through Friday from 6:30 am to 5:00 pm Pacific and Saturday from 5:30 am to 2:00 pm Pacific at 855.925.6398 or [memberservices@nexthome.com](mailto:memberservices@nexthome.com).

### PRO TIP

Save the Member Services contact information in your contacts. Get to know the team, as they will be a great asset in your journey to mastering the NextHome toolbox.

## Step 2: Setup your NextHome agent profile

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Go to

<https://intranet.nexthome.com/Training/GettingStarted> and watch the “Your Profile” video.

Taking what you learned in this video, you will now be able to build out your NextHome profile. This information is publicly displayed so this step is very important!

### PRO TIP

If you have a tablet and a computer, play the video on your tablet and follow along on your computer. You can always pause the video if you get behind.

This checklist will help ensure that your profile is built out fully and correctly.

- I have added a high-resolution headshot to my profile.
- My name and contact information are correct, and the direct phone number line is filled in.
- I have personalized my Agent Bio (publicly displayed!).
- I have added my email and my domain name to my profile.
- I have linked my social media pages to my profile.
- I have identified all of the languages that I speak.
- I have updated my temporary password to something unique that won't expire.
- My professional designations, expertise types, and license information has been updated.
- I have selected how I want to be notified when a lead comes in from one of my NextHome-provided tools and updated my Leads Tracker & kvCORE preferences.

### PRO TIP

Do this ASAP! It takes 2-3 business days for our business card vendor's design team to edit your photo to remove the background. This will need to occur before you can order business cards with a silhouetted headshot. Of course, you can order cards without a photo or with Luke right away. All orders placed by 12 pm Pacific will be produced and shipped within 5-7 business days.

- I have selected how I want to be notified regarding communication coming from the reporting system.
- I have selected how I would like to be notified regarding marketing-related communication.
- I have added my MLS credentials to my profile.
- I have uploaded photos to the [Media tab](#) and answered [Luke's questions](#).

## Step 3: “Where do I find...?”

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We have created additional training videos that will help you get started with our NextHome system. Once you are logged in, please watch the other training videos located on this page to ensure a successful start with your new, highly integrated system. <https://intranet.nexthome.com/Training/GettingStarted>

## Step 4: Update all non-NextHome provided systems

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There are many outside places where you will want to be sure you are branding yourself correctly. Here is a checklist to help you stay on track.

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| ○ Email signature   | ○ National Association of REALTORS® profile                  |
| ○ Voicemail message for all phone numbers                     | ○ RPR  |
| ○ Social Media (Facebook, LinkedIn, Instagram, YouTube, etc.) | ○ Real estate portals (Zillow, Realtor.com, Homes.com, etc.) |
| ○ State and Local Associations and MLS profiles               | ○ FHA and HUD portals, if applicable                         |
| ○ Google Maps business page                                   | ○ Relocation Companies                                       |

## Step 5: Review our Branding Guidelines & access your NextHome logos

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Before you begin marketing yourself as a NextHome agent, it is crucial that you understand the regulations outlined in our Branding Guidelines. By knowing these branding guidelines, you'll be able to create effective marketing pieces, while upholding the NextHome marketing standards:

[https://content.nexthome.com/marketing/logos/branding\\_guidelines.pdf](https://content.nexthome.com/marketing/logos/branding_guidelines.pdf)

Once you have reviewed the Branding Guidelines, you can download and access your NextHome logos. Your NextHome logo files, Luke, #HumansOverHouses logo, and our NextHome illustrations can be downloaded here:

<https://intranet.nexthome.com/Marketing/LogosAndFiles>

## Step 6: Order your NextHome business cards and marketing items

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In an effort to provide a great first impression and a quality experience to all clients, colleagues, and partners interacting with NextHome members, we require that all business cards and stationery items get purchased through designated suppliers - using local vendors for these items is not permitted.

*Here is the link to our NextHome Branding Center:*

<https://intranet.nexthome.com/Marketing/BrandingCenter>

- I have ordered my NextHome business cards.
- I have ordered my NextHome name badge.
- I have ordered my notecards, letterhead, envelopes, and folders.

*Check out Luke's Locker to order other NextHome branded items:*

<https://intranet.nexthome.com/Marketing/LukesLocker>

You have the ability to have custom apparel and promotional items made through a local vendor provided Marketing approves the final proof before your order goes into production. All proofs for custom items that use our NextHome logos (including Luke) need to be submitted to [marketing@nexthome.com](mailto:marketing@nexthome.com).

## Step 7: Order signage

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Similar to business cards and stationery, we require all NextHome members to purchase their yard signs, riders, open house directionals, feather flags, and more through our designated suppliers. This ensures consistency in quality of materials, colors, custom fonts, layouts, and more. Using a local vendor for residential signage is not permitted.

*Here is the link to our designated signage vendors:*

<https://intranet.nexthome.com/Marketing/VendorsProducts>

- I have ordered my NextHome main panels.
- I have ordered my NextHome riders, open house directionals, feather flags, etc.

You have the ability to have custom signage made when required by HOA restrictions, city ordinances, etc. All proofs for custom signage must be approved by Marketing before your order goes into production. Proofs can be submitted to [marketing@nexthome.com](mailto:marketing@nexthome.com).

## Step 8: Get familiar with your NextHome tools and services

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NextHome offers an extensive training library to help you get acquainted with your new tools and services. Completing these training videos is crucial to being able to implement them into your business successfully.

*Here is the link to our on-demand training videos:*

<https://intranet.nexthome.com/Training/Online>

## Step 9: Register for our product and service webinars

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Once you've gotten acquainted with our training videos, our webinars offer you an opportunity to interact with a training specialist to answer any questions that may arise. Check out our upcoming webinars here:

<https://intranet.nexthome.com/Training/WebinarsProduct>

*Here is a checklist to help keep you on track:*

- I have completed the Design Center webinar.
- I have completed the Mobile Connect webinar.
- I have completed the RealScout webinar.
- I have completed the NLD webinar.
- I have completed the DocuSign webinar.
- I have completed the Reach150 webinar.

Any events that you attend, including our webinar sessions, are tracked and added to your profile.

## Step 10: Get IDX approval for Mobile Connect

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Visit the Mobile Connect intranet page to determine the IDX approval process required by your MLS for Mobile Connect:

<https://intranet.nexthome.com/Marketing/MobileConnect>

## Step 11: Send out announcements to clients and sphere of influence

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It is highly suggested that you use the NextHome Design Center to create your marketing material and send announcements for the next 90 days notifying your current and past clients about your new affiliation with NextHome. It's a wonderful opportunity to maximize public exposure, reach out to people you know, and prospect for business.

*Here is the link to our Design Center:*

<https://intranet.nexthome.com/Marketing/DesignCenter/>

## Step 12: Review the Approved Supplier Catalog

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It is recommended that you review all of the NextHome Approved Suppliers. Our partners have additional services, resources, and materials that are available to you at NextHome discounted rates. It's an easy way to save hundreds, if not thousands of dollars on existing products you might already be using!

*Here is the link to our Approved Supplier Catalog:*

[https://content.nexthome.com/marketing/approved\\_supplier\\_catalog.pdf](https://content.nexthome.com/marketing/approved_supplier_catalog.pdf)

Thank you for completing the steps in our onboarding checklist. If you have any questions, please do not hesitate to reach out to our Member Services team at [memberservices@nexthome.com](mailto:memberservices@nexthome.com). We are here to assist in any way we can!