The Blake Group
2025

ONBOARDING

5-DAY AGENT CHECKLIST

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The Blake Group | 5-Day Onboarding Checklist for Agents

This checklist helps you stay on track during your first week with The Blake Group. Complete each step to ensure you're fully trained, supported, and ready to succeed.

Day 1 – Welcome & Expectations

☐ Review the welcome email from The Blake Group.

☐ Log in to the training platform.

☐ Get familiar with the course layout and start training.

Day 2 – Complete Training

☐ Complete all TBG training modules by the end of Day 2.

☐ Prepare questions or notes for follow-up coaching.

Day 3 – Live Calls Begin

☐ Begin making calls using scripts and objection handling from training.

☐ Apply manager feedback in real time.

Day 4 – Observation & Supplemental Training

☐ Maintain consistent calling activity.

☐ Implement coaching advice provided by your manager.

Day 5 – Final Coaching & Independent Readiness

☐ Demonstrate consistency in calling and objection handling.

☐ Show readiness to operate independently with minimal oversight.

Ongoing Agent Expectations

☐ Complete all training by Day 2.

☐ Start making calls on Day 3 with manager coaching.

☐ Participate in supplemental training as directed.

☐ Be ready for independent operation by Day 5.