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Lyon

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INTERNATIONAL REALTY



RUSS LYON SOTHEBY'S INTERNATIONAL REALTY

# Global Real Estate Advisor Onboarding

# Advisor Onboarding



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## SYSTEMS/TRAINING - GLOBAL REAL ESTATE ADVISOR TO DO LIST

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### Systems:

- ☐ Complete Paycom onboarding documents
  - ☐ Change your voicemail
  - ☐ Confirm email signature is correct
  - ☐ Check MLS profile for accuracy
  - ☐ Log on with support.russlyon.com to set up all devices
  - ☐ Set up credit/debit card or debit account in Lyon Connect
  - ☐ Discuss Floor Time with your manager
  - ☐ Refer to the Technology Quick Start Guide for system login information
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### Training:

- ☐ Login to Lyon Connect – connect.russlyon.com > Sign in with Google (Russ Lyon email address & password)
  - ☐ Register for Peak Training Series – Lyon Connect > Apps & Tools > One-Stop > Peak Training
  - ☐ Review Training Library - Lyon Connect > Apps & Tools > One-Stop > Training Library
  - ☐ Watch video “Intro to Lyon Connect” – Lyon Connect > Dashboard > Links and Documents > Intro to Lyon Connect
  - ☐ Review Training Calendar – calendar.google.com > Other calendars > Training
  - ☐ Complete and submit Advisor profile form – Lyon Connect > Marketing > Advisor Profile Form
  - ☐ Submit compliant advisor headshot to marketing@russlyon.com
  - ☐ Complete and submit information for your personal website – Lyon Connect > Marketing > Placester Website Request Form
  - ☐ Review Marketing Assets – Lyon Connect > Dashboard > Links & Documents > Marketing Assets
  - ☐ Expand your knowledge of all the tools available for your business - Lyon Connect > Apps & Tools
  - ☐ Review your social media sites to ensure Russ Lyon Sotheby's International Realty is reflected
  - ☐ Set up templates in Transaction Desk – Lyon Connect > Apps & Tools > Transaction Desk
  - ☐ Review Submitting File Paperwork to the office – Lyon Connect > Dashboard > Links & Documents > Submitting Documents
  - ☐ Read and Review the Policy & Procedures Manual – Paycom account
  - ☐ Inquire when the next Ninja Installation is offered and register when available – Refer to your manager for more information
  - ☐ Learn about the compensation opportunity of outgoing referrals – Refer to the Relocation Department for more information
  - ☐ Meet with our preferred Affiliated Business Partners – Refer to your office staff for contact information
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### Training - Newly Licensed Advisors Only:

- ☐ Familiarize yourself with the listing inventory in your desired area
- ☐ Find a good Open House opportunity and schedule consistent open houses
- ☐ Create a strong social media presence, rebrand yourself and meet with Marketing to discuss a strategy
- ☐ Learn how to effectively use flexMLS (training classes available)
- ☐ Setup your Transaction Desk/Authentisign account (training classes available)
- ☐ Learn about the advantages of a farming, mail campaign or email drip campaign

**CONTACT TRAINING@RUSSLYON.COM FOR MORE INFORMATION**

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## QUICK START GUIDE - Systems and Temporary Passwords

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Links to all Russ Lyon Sotheby's International Realty systems available on Lyon Connect

### Systems and Temporary Passwords

#### **Paycom (onboarding documents)**

Username: personal email address

Password is set up during onboarding

#### **Email** - [mail.russlyon.com](mailto:mail.russlyon.com) or [gmail.com](mailto:gmail.com)

User Name: [firstname.lastname@russlyon.com](mailto:firstname.lastname@russlyon.com)

Password: Welcome123!

#### **Lyon Connect** - [connect.russlyon.com](http://connect.russlyon.com)

User Name: Your Russ Lyon email address

Password: Russ Lyon email password

#### **Sotheby's International Realty Member Site - Access** - [access.sir.com](http://access.sir.com)

User Name: [firstname.lastname@sothebysrealty.com](mailto:firstname.lastname@sothebysrealty.com)

Password: Watch for email from Sotheby's International Realty with temporary password.

*Password will be good for 72 hours. If first password does not work, click "Forgot Password" link to generate a new one.*

#### **Collateral Analytics**

Username: [firstname.lastname@russlyon.com](mailto:firstname.lastname@russlyon.com)

Temporary password: p1wd

#### **IT Support**

[support.russlyon.com](mailto:support.russlyon.com)

**CONTACT [TRAINING@RUSSLYON.COM](mailto:TRAINING@RUSSLYON.COM) FOR MORE INFORMATION**

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## QUICK START GUIDE - Tools, Training and Applications

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### Tools, Training, and Applications

#### Upcoming Classes

Lyon Connect > Apps and Tools > One Stop

#### Agent Training

Weekly on Thursdays at 10 am | Link available in One Source weekly email

#### flexMLS training or Transaction Desk & Authentisign training

Offered monthly through Peak Training | Private training available by appointment

#### ToolKit CMA (comparable market analysis)

Lyon Connect > Apps and Tools > ToolKit CMA

#### Collateral Analytics (automated valuation model)

Lyon Connect > Apps and Tools > Collateral Analytics

#### Activepipe (email marketing - \$20/month)

Lyon Connect > Apps and Tools > Activepipe

#### Design Vault (marketing design tool)

Lyon Connect > Apps and Tools > Design Vault

#### MoxiWorks (CRM, presentation suite, marketing design tool)

Lyon Connect > Apps and Tools > MoxiWorks

#### Xpressdocs (print marketing)

Lyon Connect > Apps and Tools > Xpressdocs

#### Placester (personal website)

Lyon Connect > Marketing > Placester Website Request Form

#### Marketing Requests/Consultation

Lyon Connect > Marketing > Meeting Request Order Form

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## PAPERWORK CHEAT SHEET

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Please submit all paperwork in pdf format to the appropriate office email below using the appropriate subject line. These email addresses will send your paperwork to the appropriate person and should be used for all file correspondence.

### Office

### All Listing Paperwork

### All Lease/ Sales Contracts

Camelback

listings.camelback@russlyon.com

contracts.camelback@russlyon.com

Carefree

listings.carefree@russlyon.com

contracts.carefree@russlyon.com

Desert Mtn

listings.dm@russlyon.com

contracts.dm@russlyon.com

Flagstaff

listings.flagstaff@russlyon.com

contracts.flagstaff@russlyon.com

Pinnacle Peak

listings.pinnacle@russlyon.com

contracts.pinnacle@russlyon.com

Prescott

listing.prescott@russlyon.com

contracts.prescott@russlyon.com

Sedona

listings.sedona@russlyon.com

contracts.sedona@russlyon.com

SE Valley

listings.sev@russlyon.com

contracts.sev@russlyon.com

Tubac

listings.tubac@russlyon.com

contracts.tubac@russlyon.com

Tucson

listings.tucson@russlyon.com

contracts.tucson@russlyon.com

West Valley

listings.westvalley@russlyon.com

contracts.westvalley@russlyon.com

All submissions of **NEW** listing/lease/sales contracts must include the appropriate information sheet. These information sheets can be found in Transaction Desk or under Links & Documents on your Lyon Connect dashboard.

- New Listing (Property for Sale or Lease) – LISTING INFORMATION SHEET
- New Sale Contract – SALE INFORMATION SHEET
- New Lease Contract – LEASE CONTRACT INFORMATION SHEET

**ALWAYS** include the following in the **SUBJECT** line of your email:

1. Type of document(s)
2. The property address, including street #

Examples:

- New Listing/Contract/Lease: Subject: New listing – 123 N Main St
- Additional Documents: Subject: Add'l Docs – 123 N Main St
- Listing Status Change: Subject: Price Change – 123 N Main St

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## Closing Procedures

Compensation is paid by direct deposit and will be processed within 1 business day of receiving compensation and the final settlement statement from the title company.

All required listing and contract documents must be in the file at closing to receive your compensation payment. Compensation payments will be held until the file is complete. Please review your file in Lyon Connect, or contact your office contract administrator, prior to closing to ensure your file is complete.

Direct deposits will post to your account within 24-48 hours from the time we release your funds. You will receive, by email, a direct deposit notice on the day your deposit has been processed.

If your file is not complete within 48 hours of closing, a check will be cut and held by your contract administrator until the file is complete. Once the file is complete, the check will be mailed to your home address on file.

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## REQUIRED DOCUMENT CHEAT SHEET - TRANSACTION DOCUMENTS

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### RESIDENTIAL SALE - LIST SIDE

Items available on: Transaction Desk

#### **REQUIRED**

Sale Information Sheet  
MLS Printout  
Earnest Money Receipt  
Purchase Contract  
Pre-Qualification or Proof of Funds  
Seller Property Disclosure Statement (SPDS)  
CLUE/Insurance Claims  
Buyer's Inspection Notice (*inspection report if referenced in BINSR*)  
Buyer Walk-Thru  
Final Settlement Statement

#### **IF APPLICABLE**

Compensation Agreement Between Broker  
Consent to Dual Representation  
Counter Offer  
Addendum  
H.O.A Condominium Planned Community Addendum  
Seller Compensation Agreement  
Additional Clause Addendum  
On-Site Wastewater Addendum  
Domestic Well Addendum  
Short Sale Addendum  
Solar Addendum  
Unrepresented Buyer Disclosure  
Agency Disclosure from Unrepresented Buyer  
Loan Status Update  
Lead-Based Paint Disclosure  
Airport Disclosure  
Pool Safety Notice (Buyer)  
Authorized Signers  
Referral Agreement  
Referral Company W-9  
Domestic Water Well SPDS  
Cure Notice  
Cancellation Notice

### RESIDENTIAL SALE - BUY SIDE

Items available on: Transaction Desk

#### **REQUIRED**

Sale Information Sheet  
MLS Printout  
Earnest Money Receipt  
Purchase Contract  
Buyer-Broker Agreement (*Exclusive or Agreement to Show*)  
Agency Disclosure  
Pre-Qualification or Proof of Funds  
Affiliated Business Disclosure (*proof of delivery to list side*)  
Buyer Advisory  
Wire Fraud Advisory  
Seller Property Disclosure Statement (SPDS)  
CLUE/Insurance Claims  
Fair Housing  
Buyer's Inspection Notice (*inspection report if referenced in BINSR*)  
Buyer Walk-Thru  
Final Settlement Statement

#### **IF APPLICABLE**

Compensation Agreement Between Brokers  
Consent to Dual Rep  
Counter Offer  
Addendum  
H.O.A Condominium Planned Community Addendum  
Seller Compensation Agreement  
Buyer/Tenant Employment Agreement Addendum  
Additional Clause Addendum  
On-Site Wastewater Addendum  
Domestic Well Addendum  
Short Sale Addendum  
Solar Addendum  
Loan Status Update  
Private Affiliated Business Disclosure (*proof of delivery to list side*)  
Lead-Based Paint Disclosure  
Pool Safety Notice  
Authorized Signers  
Referral Agreement  
Referral Company W-9  
Domestic Water Well SPDS  
Cure Notice  
Cancellation Notice

**CONTACT YOUR CONTRACT ADMINISTRATOR FOR MORE INFORMATION**

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## REQUIRED DOCUMENT CHEAT SHEET - TRANSACTION DOCUMENTS

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### LOT / VACANT LAND SALE

Items available on: Transaction Desk

#### **REQUIRED**

Sale Information Sheet  
MLS Printout  
Earnest Money Receipt  
Vacant Land/Lot Contract  
Buyer-Broker Agreement (Buyer)  
Agency Disclosure (Buyer)  
Pre-Qualification or Proof of Funds  
Affiliated Business (Buyer) (*proof of delivery to list side*)  
Buyer Advisory (Buyer)  
Wire Fraud Advisory (Buyer)  
Vacant Land SPDS  
Vacant Land BINSR (*inspection report if referenced in BINSR*)  
Final Settlement Statement

#### **IF APPLICABLE**

Consent to Dual Representation  
Counter Offer  
Addendum  
H.O.A Condominium Planned Community Addendum  
Compensation Agreement Between Brokers  
Seller Compensation Agreement  
Buyer/Tenant Employment Agreement Addendum  
Additional Clause Addendum  
Short Sale Addendum  
Unrepresented Buyer Disclosure (*Agency Disclosure marked Seller only signed by Buyer*)  
Loan Status Update  
Lead-Based Paint Disclosure  
Private Affiliated Business Disclosure (*proof of delivery to other side*)  
Pool Safety Notice (Buyer)  
Authorized Signers  
Affidavit of Disclosure  
Referral Agreement  
Referral Company W-9  
Cure Notice  
Cancellation Notice

### NEW HOME/BUILDER SALE

Items available on: Transaction Desk

#### **REQUIRED**

Sale Information Sheet  
Earnest Money Receipt  
Builder Purchase Contract  
Broker Registration Agreement  
Buyer-Broker Agreement  
Agency Disclosure (Buyer)  
Affiliated Business (Buyer)  
Buyer Advisory (Buyer)  
Wire Fraud Advisory  
Fair Housing (Buyer)  
Final Settlement Statement

#### **IF APPLICABLE**

Compensation Agreement Between Brokers  
Seller Compensation Agreement  
Authorized Signers  
Buyer/Tenant Employment Agreement Addendum  
Buyer Walk-Thru  
Pool Safety Notice (Buyer)  
Private Affiliated Business Disclosure  
Referral Agreement  
Referral Company W-9  
Cure Notice  
Cancellation

### REFERRAL / OTHER

#### **REQUIRED**

Referral Information Sheet  
Referral Agreement or Commission Agreement

#### **IF APPLICABLE**

Final Settlement Statement

**CONTACT YOUR CONTRACT ADMINISTRATOR FOR MORE INFORMATION**



## REQUIRED DOCUMENT CHEAT SHEET - LISTING & LEASE DOCUMENTS

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### RESIDENTIAL LISTING (Sale or Lease)

Items available on: Transaction Desk

#### **REQUIRED**

Listing Information Sheet  
MLS Printout with Expiration Date  
Exclusive Right to Sell/Listing Contract  
MLS Profile Sheet  
Agency Disclosure  
Affiliated Business Disclosure (upload to MLS)  
Wire Fraud Advisory  
Fair Housing  
Seller Property Disclosure Statement (SPDS)

#### **IF APPLICABLE**

H.O.A Condominium Planned Community Addendum  
Lead-Based Paint Disclosure  
Pool Safety Notice  
Authorized Signers  
Exempt Delayed Form (TARMLS)  
Listing Contract Addendum  
Private Affiliated Business Disclosure (*upload to MLS*)  
Short Sale Addendum  
Status Change Form for Price Change  
Status Change Form for Listing Extension  
Status Change Form for Cancellation  
Status Change Form  
Referral Agreement  
Domestic Water Well SPDS  
ADRE Short Sale Advisory  
Rejected Offers

### LEASE CONTRACT

Items available on: Transaction Desk

#### **REQUIRED**

Lease Information Sheet  
MLS Printout  
Residential Lease Agreement  
Tenant-Broker Exclusive Employment Agreement (Tenant)  
Agency Disclosure (Tenant)  
Affiliated Business Disclosure (Tenant)  
Fair Housing (Tenant)

#### **IF APPLICABLE**

Counter Offer  
Addendum  
Compensation Agreement Between Brokers  
Seller Compensation Addendum  
Buyer-Tenant Employment Agreement Addendum (Tenant)  
Consent to Dual Representation  
Lease Owners SPDS  
Move-In Move-Out Checklist  
Lead-Based Paint Disclosure  
Pool Safety Notice (Tenant)  
Authorized Signers  
Referral Agreement  
Co-Broke/Referral Company W-9  
Cancellation

### LEASE EXTENSION

#### **REQUIRED**

Lease Information Sheet for Extension Period  
Extension Addendum



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## HEAD SHOT GUIDELINES

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**Photography guidelines and submission procedure:** All head shots must meet the following Russ Lyon Sotheby's International Realty criteria to be compliant and used for business cards, Global Real Estate Advisor profile, and/or company marketing.

### For the Advisors:

- Head shots must be taken by a professional photographer
- Selfies and images taken on a cell phone will not be accepted
- Color head shots will be used on russlyon.com, sothebysrealty.com, and on business cards
- Once your head shot is taken and finalized by your photographer, your head shot must be submitted through the Russ Lyon Sotheby's International Realty Advisor Profile form located in Lyon Connect to be placed online and in our system.
  - Direct emails will not be accepted.
  - If you do not provide a compliant head shot, your photo will not be displayed on russlyon.com, sothebysrealty.com or luxuryrealestate.com until you do.

### For Photographers:

- Head and shoulder shots
- Environmental backgrounds are acceptable
- Background must be muted if not a solid color
- The photo must be at least 900 x 1200 pixels (3:4 ratio)
- The photo must be at least 300 DPI
- Portrait orientation only
- Landscape orientation will not be accepted
- No watermarks or logos on submitted head shots
- Please provide a color and black and white (bw) version of the head shot
  - If no black and white version is provided, the marketing department will use a graphic design program to convert the photo for marketing purposes

### Samples of acceptable head shots:



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## THE RUSS LYON FOUNDATION

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The Russ Lyon Foundation strives to organize and work as a collective force, more powerful than the sum of the individuals, to improve the lives and communities of those in need, while spreading compassion and kindness within our state and across our borders.

**EVENTS:** Each quarter, our offices host events to support local charities throughout the state of Arizona. These events range from monetary donations and item collections to volunteer opportunities. Learn more at [russlyonfoundation.org/events](https://russlyonfoundation.org/events).

**MATCHING FUND APPLICATION:** Double the impact of your donations. Our advisors & employees are able to request dollar-for-dollar matching donations from the Russ Lyon Foundation. [russlyonfoundation.org/members](https://russlyonfoundation.org/members)

- The donation must be an individual donation.
- There is a \$2000 request cap per Advisor/Employee per year.
- Requests are reviewed quarterly by the Russ Lyon Foundation Advisory Council. All requests are subject to final approval by the Advisory Council, a panel of our peers.
- The charity must be a 501c3 organization based in Arizona or with a local chapter.
- Church general fund donations are excluded. Donations to a church special event or project will be considered.
- If you received personal marketing or advertising in return for your donation, the matching contribution will be limited to no more than \$500.00.
- If the donation was used for the Arizona Tax Credit, matching funds will be limited to the amount in excess of the Arizona Tax Credit received (\$400 individual, \$800 jointly).

**LYON'S FUND APPLICATION:** Donations to the Russ Lyon Foundation Lyon's Fund are dedicated to supporting the Global Real Estate Advisors and Staff of Russ Lyon Sotheby's International Realty experiencing life hardships.

- These funds will be used to assist with short term emergency needs, if the recipient is unable to support themselves due to a life altering situation.
- Applications will be kept in the strictest confidence and reviewed by dedicated members of the RLF Board of Directors.
- If you know of a Russ Lyon Sotheby's International Realty family member in need, please nominate them by submitting an application on their behalf

**HOW TO DONATE:** You can donate from your compensation, through our monthly billing or on our website [russlyonfoundation.org/donate](https://russlyonfoundation.org/donate).

**TOGETHER, ALL THINGS ARE POSSIBLE!**

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