

CHRONOLOGICAL CHECKLIST FOR NEW MULTIPLE LISTING SERVICE EXECUTIVES

Use this checklist as a general guide to get started in your new role as an Association Executive (AE) with a Multiple Listing Service (MLS).

WEEK 1:

_____ Ensure that you are set up in NAR's central membership database [REALTORS® M1](#) and are provided with a personal M1 identification number. Your MLS's Point of Entry (POE) is the only person who can add or update your M1 record. The POE could be you or another staff member. If you need assistance during this process, please don't hesitate to reach out to NAR's M1 Ecommerce Support Team at poesupport@nar.realtor or 1-800-868-3225 from 8:00 AM - 6:00 PM Central Time, Monday through Friday. Make sure your personal M1 record is added to the "MLS Executive" field of your MLS's office record in M1.

_____ Establish your account on NAR's [The Hub](#). The Hub is NAR's primary communication vehicle for updates, important dates, upcoming professional development opportunities, and more. As a new AE, you will be able to engage with other MLS Executives and Staff through various MLS Hub communities.

_____ Address computer security by changing any existing MLS related passwords from the previous AE and backing up all your files. Do not overwrite existing files.

_____ Study your MLS's Policies and Procedures and Rules and Regulations and **be sure** to continue to reference them throughout your onboarding and as you learn your role. These are the foundation of the MLS and must be followed to ensure that the MLS is protected and following the approved governance structure. [Access the model MLS governing documents for a resource.](#)

_____ Secure MLS financial records, documents, audits, and tax returns.

_____ Identify and organize the MLS's vendors, contacts, and contracts. If there are existing vendor contracts in place, contact those companies for an introduction and provide the new contact information they should use moving forward.

_____ Review your MLS's financial policies in-depth. Based on your policies, make sure that any financial accounts, credit card(s), bills, utilities, etc. have the proper signatory and contact information.

_____ Meet with your MLS's accountant/bookkeeper (if applicable) to address the following:

- Accountant's roles and responsibilities
- Sales tax and tax deposits
- Property taxes
- Tax returns and filing requirements.
- Protocols for handling money
- Identify authorized signors of the MLS and amount limits (per policies)
- Discuss a financial audit if necessary.

_____ Document all the MLS's fiscal and physical assets, including building and technology equipment. Review your capital expenses and schedule.

_____ Meet with your staff as a whole and individually (if applicable) to review job descriptions and responsibilities. Discuss what type of management style helps that staff member excel and express your leadership style. If needed, review sample job descriptions for local and state MLS staff in the [REALTOR® Association Resource Exchange \(RARE\) Database](#).

_____ Meet with your president or committee chair (depending on governance method) to discuss roles and responsibilities. For guidance, review the [President/Chief Staff Executive Checklist](#) with your president to identify responsibilities of each role.

_____ Meet individually with each of your board of director members and executive committee members or committee members.

_____ Meet with the treasurer to review the MLS budget.

_____ Introduce yourself to the Association/MLS Legal Counsel and understand the protocol established for their services.

WEEKS 2-4:

_____ Utilize the [Organization Assessment Checklist](#), which includes a "MLS/Information Services" section, to help you identify and learn the basic operational responsibilities of the MLS and how they are managed.

_____ Familiarize yourself with the MLS's website and social media accounts. Gain understanding of the MLS's communication tempo and the systems used to execute newsletters, videos, etc.

_____ Locate the MLS's Articles of Incorporation and check with the Secretary of State on the status of the business.

_____ Note any upcoming time sensitive activities and plan accordingly to ensure all important deadlines and goals are met. Examples:

- Election of officers (if applicable)
- Director elections (if applicable)
- Insurance renewals
- Executive Committee and/or Board of Directors meetings
- MLS fees and billing cycles

_____ Learn and understand the MLS's subscription policies, including fees policies, types of subscriptions, MLS of choice, your subscriber application, and new subscriber requirements (MLS training, etc.)

_____ Know how to prepare for and coordinate MLS related meetings. Make sure to identify who needs to be involved with scheduling, setting the agendas, and attending each meeting. Understand the frequency of the meetings and the staff person required to attend, and make sure all MLS meeting calendars are up to date. Review NAR's [Answer Book](#) chapter on "Managing Meetings."

_____ Reach out to your neighboring MLSs to introduce yourself and build rapport.



MONTHS 2-4:

_____ Review [NAR's conference schedule](#) and plan to attend the annual AE Institute (AEI). AEI is the premier professional development event for local and state REALTOR® association and MLS staff. AEI provides quality training for all association and MLS staff, from new to veteran.

_____ Establish a deep understanding of the MLS's budget. Make sure you completely understand the MLS's budget process, revenue sources, and expenses. Understand who is included in the travel expenses, what types of items correspond to each GL, and make sure the policies established match the practice. Know the difference between types of expenses that require approval from the Board of Directors (if applicable) and expenses that do not.

_____ Learn about NAR's Errors and Omissions (E&O) Insurance. MLSs are covered through NAR's umbrella policy and must maintain certain requirements to continue coverage. Learn these requirements and what the program offers and covers. Know who to contact at NAR with questions, and make sure to inquire with the BOD each year to discuss purchasing additional coverage, if necessary.

_____ In addition to NAR's E&O Insurance, understand the MLS's additional coverage that is acquired individually. Review plans such as workers' compensation, business policy, indemnification clause for D&O, indemnification for building, bonding, etc.

_____ Check when the MLS's Rules were last certified by NAR. Questions regarding NAR's certification of the MLS's governing documents may be directed to NAR's Member Experience Team at narpolicyquestions@nar.realtor or 312-329-8399.

_____ If any MLS leader travels to state and/or national conferences, confirm who registers each individual and makes travel reservations. Asking previous leaders what is customary could be helpful, but always make sure to adapt a style that is conducive to you and your present leadership.

MONTHS 5-7:

_____ Develop a strong understanding of liability issues, including antitrust, fair housing, E&O, and the MLS.

_____ Assess the MLS's strategic plan. Ensure the plan is up to date with all goals that have been accomplished noted and meet with MLS leadership to adjust completion dates and priorities as needed. If the MLS needs a strategic plan, review the [Strategic Planning Resources Toolkit](#), and begin work towards creating a strategic plan.

_____ Locate and review the documents that correlate to your performance evaluation. Make sure you know what you are expected to accomplish and how your success will be measured. Learn the evaluation process, who provides input, and how goals are established.

_____ Reach out to the participants in the MLS to schedule introductory meetings with you. Discuss this step with the president/committee chair to inquire if they would like to attend these meetings with you. Inquire about attending an office meeting to introduce yourself.

_____ Take time to learn basic real estate practices and understand the business of MLS subscribers. Sign up for industry publications and resources, with topics such as:

- MLS trends and issues
- Real estate terminology
- Forms
- Independent contract status

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- Brokerage structures
- Personal assistants and office managers
- Risk management

MONTHS 8-12

_____ If one does not exist, establish an internal annual calendar for the MLS to ensure all critical dates and timelines are met and accounted for.

_____ Review employee job descriptions to verify they are up to date based on your assessment of the organization over the last year.

_____ Explore professional development opportunities to continue your growth.

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