Team ~~Brokerage~~ PLAYBOOK

kw

Where Entrepreneurs Thrive

Welcome to the Teamerage Playbook

Teamerage is the system that gives you a winning strategy to make sure there's NO broke in your brokerage. It's the best answer to the pivotal industry question of *"what do real estate agents want most?"*

Polling conducted by both NAR and Bane & Company, Inc. asked agents "what is the one thing you would like most from your brokerage or team", the overwhelming answer: leads and appointments.

The real estate brokerage industry has a past tradition of providing leads to agents. In the 70's & 80's real estate brokerages ran ads to generate leads for their agents. In the 80's and 90's relocation divisions owned by large brokerages were pivotal parts of their value to agents. In the early 2000's the industry watched as teams, aggregators, and technology companies became the dominant channels by which agents received direct leads to consumers. **Brokerages became serverages.**
And as services became offered a la cart, they turned into potential commodities.

Today, more than anything else, real estate agents want easier access to consumers and are more than willing and happy to partner with their brokerages to receive leads and appointments. The most successful and profitable brokerages will be Market Centers that not only continue to provide the broker services, training, support, work environment, community, culture, and profit share that has helped to create the real estate company of choice for more agents under one brand than any real estate company in the world AND will also provide leads and appointments.
This new combination affectionately called Teamerage provides the opportunity for higher Market Center profitability and potentially unrecruitable, successful, real estate agents.

This playbook was designed to provide you with the model for how to run the most effective Teamerage as well as walking you through, step-by-step, how to implement it. The safest way to transform into a Teamerage is by taking advantage of Keller Williams' partners and following a two-step process.

Follow along on the next page for Steps 1 and 2.

Step 1: Generate Leads

1. **The Market Center signs up for RISE**
    1. The Market Center buys RISE, which costs $300 per platform. 3 platforms are recommended because each platform can service up to approximately 20 agents at scale.
    2. RISE trains, supports, and routes warm connections with buyers and sellers directly to the agents in the program from real estate aggregators via their apps.
    3. These aggregators charge a referral fee that is between 35-40%.
    4. At closing the Market Center collects 50% of the GCI and then pays the referral fee of 35-40% to the aggregator. Resulting in a 10-15% net profit per unit closed.
    5. The remaining 50% is then split with the agent and Market Center as per their split and cap program.

1. **The Market Center drives agents to the 72SOLD program**
    1. The Market Center drives agents to the 72SOLD Lead Generation Tool Program.
    2. Agents/teams sign up for the 72SOLD weekly education plus the use of the 72SOLD marketing materials and MOFIR. This costs the agent $72 per month.
    3. Once the agent/teams gets familiar with the program and they wish to receive direct listings referrals from 72SOLD they can sign up on a monthly basis to receive an estimated 4-6 listing referrals per month, this is called a "unit". Each unit costs $1,500/mth plus a 25% referral fee to 72SOLD.
    4. If a Market Center has 4 or fewer units subscribed to either their teamerage or to agents within their Market Center, 72SOLD rebates them 5% of the GCI on all closed units.
    5. If a Market Center has 5 or more units subscribed to either their teamerage or to agents within their Market Center, 72SOLD rebates them 10% of the GCI on all closed units.

Step 2: Create, Nurture, and Monetize Leads

1. Continue providing RISE leads, drive more agents to the program, and support the community.
2. Continue providing the 72SOLD program, drive more agents to the program and support the community.
3. Follow the systems laid out in the remainder of this Playbook

*Disclaimer: Although all agents may participate in the Lead Generation Tool Program, operations for the Direct Referral Program in Arizona will differ.

Step 1: Generate Leads

RISE

Step 1: Sign up for the S2L Program at salesisacareer.com
Step 2: The Director of Lead Generation attend RISE onboarding with RISE professionals for KW specific onboarding
Step 3: Help the Director of Lead Generation start the program inside the Market Center.
Step 4: Select the first 5 Agents:

- Must be hungry and willing to run down all types of leads
- Tech savvy enough to use the app
- Must be coachable

Step 5: Add 5 more each month until you hit 20. Then you can start your second platform.
Step 6:Attend RISE trainings with everyone in the community

- Weekly 30 minute RISE training with everyone in the community
- Attend the RISE specific mastermind on Fridays to learn tips, tricks, and what is helping other agents find success in the program

Step 7:Look at the RISE provided scoreboard weekly with the community

The RISE training coupled with the warm connections will put your agents in a position to speak with more "now" buyers and sellers.

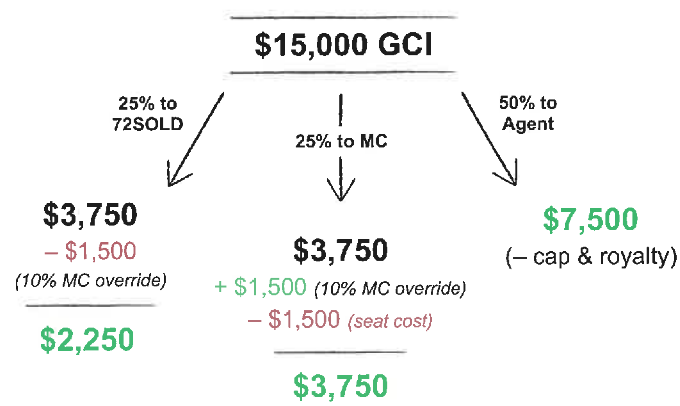
72SOLD

Step 1: The Director of Lead Generation signs up for the Lead Generation Tool Program at 72payments.com
Step 2: Select the first 5 Agents:

- Must be hungry and willing to run down all types of leads
- Tech savvy enough to use the app
- Must be coachable

Step 3: All agents sign up for the Lead Generation Tool Program and attend weekly trainings
Step 4: The Market Center purchases seats for the Leads Referral Program to begin receiving listing referrals

Since the Lead Generation Company/Division is making the $1,500 seat investment for the Leads Referral Program, they receive a 25% referral fee. 72SOLD also receives a 25% referral fee. Depending the amount of seats connected to the Market Center and active, the Market Center will receive a 5-10% referral fee.



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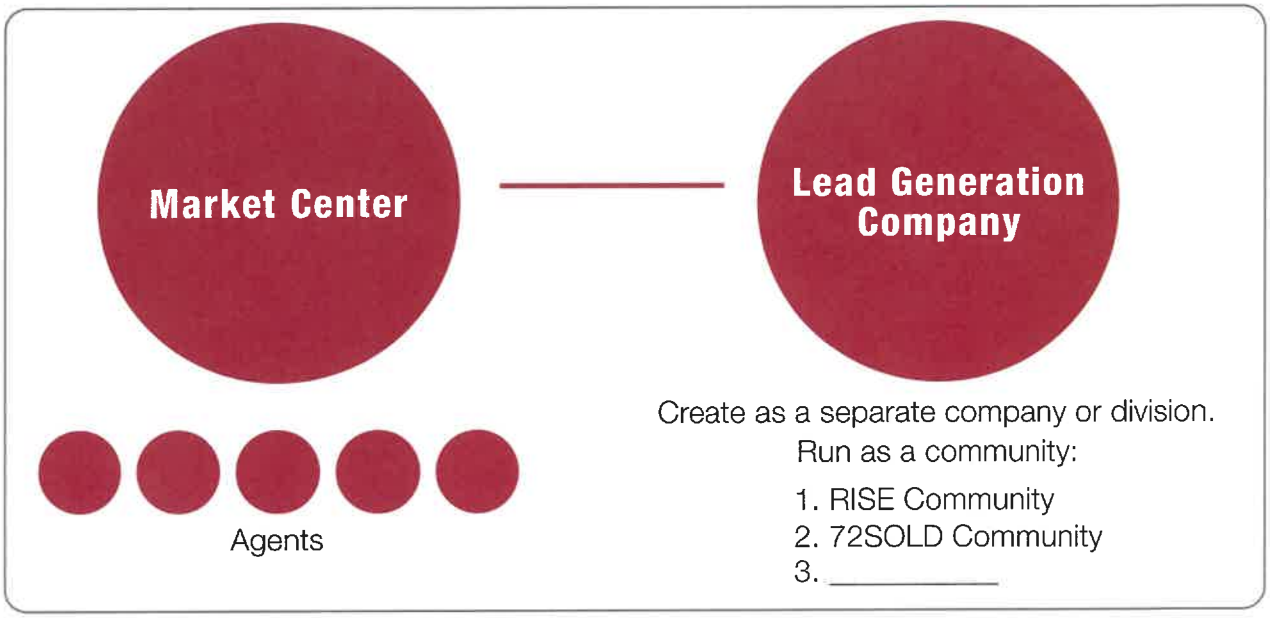
Step 1: Generate Leads

Once you make the decision to create, nurture, and monetize leads at scale you will need an entity for the expenses and revenue. You are creating a Lead Generation Division which will either operate below the line or as a completely free-standing company. In the illustration below we show step one as building Market Center filled with agents and step two is to create the new Lead Generation Division.



Most real estate teams scale their agent count in direct relation with the number of leads they can produce. As soon as they have too many leads and not enough time to properly follow up with them, their conversion rates start to decline. In response the team recruits more agents so they can service more leads in an effective manner.

Let's say that a team owner has enough leads and systems to enable 5 agents on their team to close 2 transactions per month at an average of $12,000 in GCI. At a 50/50 split with the agent, this would mean that each month that agent would create a total of $24,000 in Gross GCI and the team would be entitled to $12,000 Gross or $120,000 Gross per year. The average agent is on a team for about 3 years and over that time would generate $360,000 in Gross Team GCI. If that team was operating at a 30% profit margin each agent on the team would generate $108,000 NET profits to the team in a three-year time period.

Now, imagine if that team had 100 agents on it. That would mean they would multiply $108,000 X 100 agents = $10,800,000 NET Profit every three years!!! The challenge is that it is difficult to recruit that many agents and most teams never will.

HOW MANY AGENTS DO YOU HAVE IN YOUR MARKET CENTER?

BOOM! You already have the largest sales forces in the entire industry making you 90% of the way there already. This means that Market Centers have the opposite challenge and only one hurdle to overcome: to create enough leads and appointments backed with the right systems and people to allow as many agents as possible who want to participate to have massive success.

Step 2: Create, Nurture, and Monetize Leads

step 1 Create Leads through Additional Sources

1. Buy Leads
2. Prospect and Market to Create Leads

step 2 Hire to the Organization Chart

1. Hire talent
   Director of Lead Generation, Data Manager, ISA, Sales Agent, Transaction Coordinator
2. Hire it Done

step 3 Qualify the Lead

1. All "Now" Business Will Be Sent to An Agent Immediately
2. All "Future" Business Will Be Sent For Short and Long Term Nurture

step 4 Identify Agents, Train, and Hold Accountable

1. Role Model, Role Play, Real Play
2. Meet Weekly as a Community
3. Shadowing
4. 1 on 1 Coaching
5. Database Rules and Discipline

step 5 Nurture Future Business

1. Use Personal Communication to Build Relationships
2. Send Real Estate Information to Educate the Consumer

step 6 Manage the Database

1. Run a Powerful 36 Touch Program

1. Create leads

Not all leads are created equal. Lead quality can differ greatly based on the source where the lead was generated as well as the direct offer that the consumer was responding to. The lead who clicks a photo of a home to see more pictures and the lead who completes a form requesting to speak to a real estate agent are two very different types of leads. The former will transact someday and the latter is likely to want to transact now. The key to all lead generation is understanding that the battle is always fought at the top of the funnel and that at some point everyone is a buyer or a seller. ***All leads are great leads!***

Once there are short and long-term nurturing systems in place this results in a reliable conversion ratio of leads to warm connections to appointments. Once this happens the only focus is to make sure that the top of the funnel is receiving enough leads to ensure that we accomplish our closing goals. There are two primary ways to create top of the funnel leads:

1.) Buy Leads

- Bought Leads can either be generated through your CRM or a third-party source like Google Ads.
- To generate new bought leads in Command, reference Tech Play #2 - Run Social Media Ads (paid).

NOTE: **Market Centers who desire the fastest and easiest implementation of a Lead Program can simply sign up for RISE and/or 72SOLD which will funnel leads directly to the agents in their program.**

2.) Prospect and Market to Create Leads

- If you choose to directly generate your own leads, you may need a Director of Lead Generation. This could be your current Productivity Coach, someone in your Market Center, or a new hire. Your database manager prospects and markets to generate leads.

Below is a list of prospecting and marketing tools:

Prospecting

1. Phone or Face to Face
   1. Listings without Agency
      1. FSBOs (For Sale By Owners)
      2. Expired Listings
   2. Circle Prospecting
      1. Neighborhoods
      2. Apartment Complexes
      3. Recently Sold Listings
      4. Recently Listed Properties
   3. Community Outreach
      1. Charity
      2. Volunteer Work
   4. Key Relationships
      1. Corporations
      2. Builders
      3. Banks
      4. Third-Party, Data Companies
      5. Investors
   5. Teaching and Speaking Opportunities
   6. Meals
   7. Door-to-Door Canvassing
   8. Networking Events
   9. Booth and Kiosks
   10. Walk-ins
2. Text Correspondence
   1. SMS
   2. Messenger
   3. Email

Both

1. Farming
   1. Geographic
   2. Demographic
2. Events
   1. Open Houses
   2. Seminars
   3. Contests
   4. Client Appreciation Events
3. Networking
   1. Sphere
   2. Past Clients
   3. Allied Resources
   4. Agents
4. Purchased
   1. Referral Networks
   2. Advertising Networks
   3. Clientele

Marketing

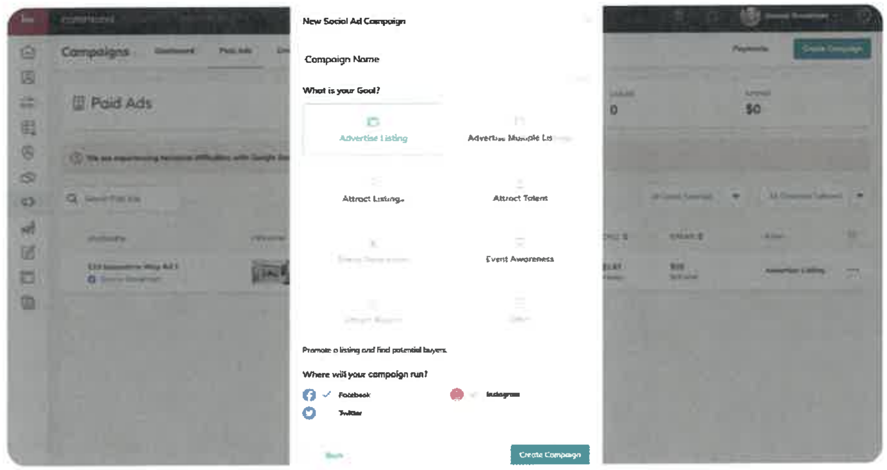
1. **Advertising**
   1. Pay Per Click
   2. SEO
   3. Radio
   4. TV
   5. Newspapers
   6. Personal Vehicles
   7. Bus Stop Benches
   8. Social Media
   9. Portals
   10. Magazines
   11. Billboards
   12. Yellow Pages
   13. Grocery Carts
   14. Moving Vans
2. **Broadcast/Content Creation**
   1. Radio Segments
   2. TV Shows
   3. Live Social Media
   4. Blogs
3. **Direct Mail (Non-Farm)**
   1. Postcard Campaigns
   2. Special Events Cards
   3. Just Sold/Just Listed cards
   4. Quarterly Market Updates
4. **Promotional Items/Swag**
5. **Public Relations/Press**
   1. News Releases
   2. Advice Columns
6. **Sponsorship**

Tech Play #2: **Run Social Media Ads (paid)**

Agents can run Social Media Ads through Command on Facebook, Instagram, Twitter, & Google. Campaigns > Social Ads provides a dashboard to monitor ads & track leads. Leads captured are added to Contacts. Lead settings allow for auto-tagging & triggering SmartPlans. Listings are connected to bring in description & media from MLS.

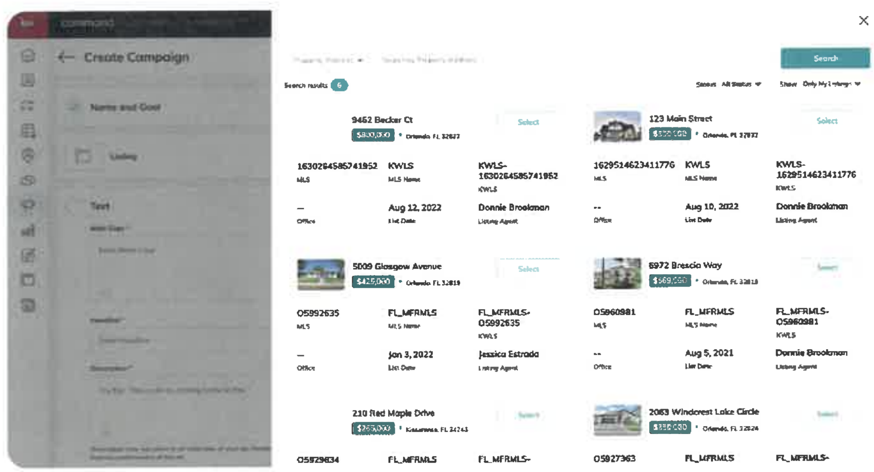
Create a Social Ad

1. Choose Create Campaign
2. Select Social Ad
3. Name the campaign
4. Choose campaign goal
5. Select Social Channel(s)



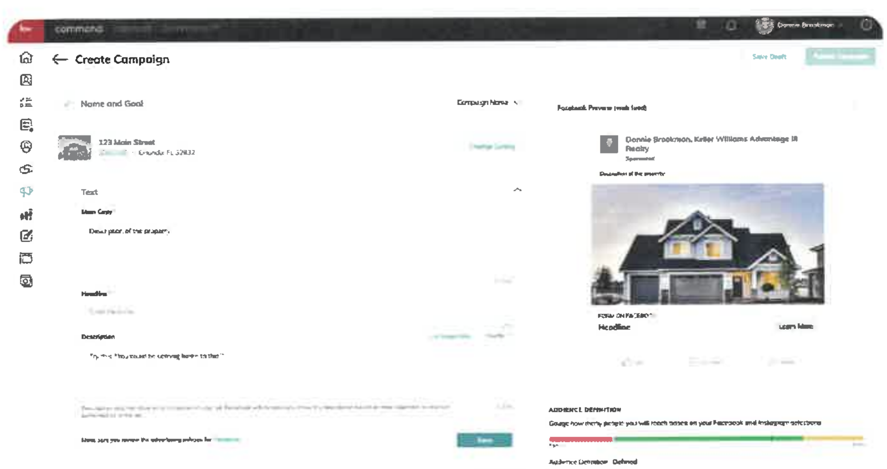
Import from a Listing

1. Browse & select a listing
2. Photo media & description will pull in from MLS



Customize Social Ad

1. Customize Text
2. Customize Media
3. Select multiple listing photos from MLS
4. Select images from Designs
5. Upload directly from computer



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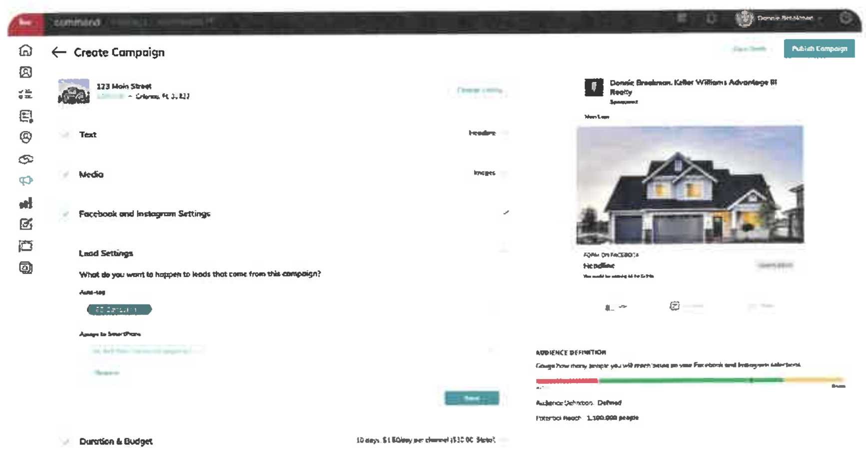
Social Settings

1. Confirm Social Pages
2. Select Destination
3. Lead Capture Form - bring lead into Contacts
4. Site/Landing Page - redirect to external source
5. Audience
6. Auto, Custom, or Saved

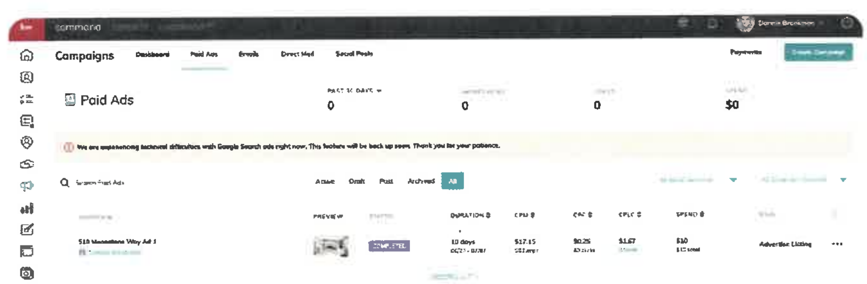
Lead Settings & Budget

1. Choose contact tag(s) added to leads captured
2. Select SmartPlan(s) triggered for leads captured



Monitor Ad Metrics

1. Dashboard to monitor lead metrics & leads captured
2. Duplicate an Ad
3. Duplicate & run
4. Customize & run



2. Hire to the Organization Chart

Before you implement system and the tools to run a lean, mean, lead generation machine, you need the people to support your agents so that they can have the highest conversion rate and provide a superior consumer experience. This can be accomplished by hiring talented people to run the plays or by leveraging your vendor partners.

Director of Lead Generation

If you choose to generate leads in-house, you will need a Director of Lead Generation. This should be your Productivity Coach. Your Director of Lead Generation prospects and markets to generate leads, find new lead sources, and works to minimize the cost per lead acquired. In addition, the Director of Lead Generation can also be responsible for training the sales agents in the Laws of the Pipeline, conversations and skills, running daily role modeling and role play, and most importantly, providing one-on-one coaching and accountability.

Database Manager

Maintain a clean, segmented, updated and disciplined database when trying to maximize the conversion rate. Your Database Manager will ensure that all leads are properly segmented, distributed, and communicated with in accordance with the Laws of the Pipeline.

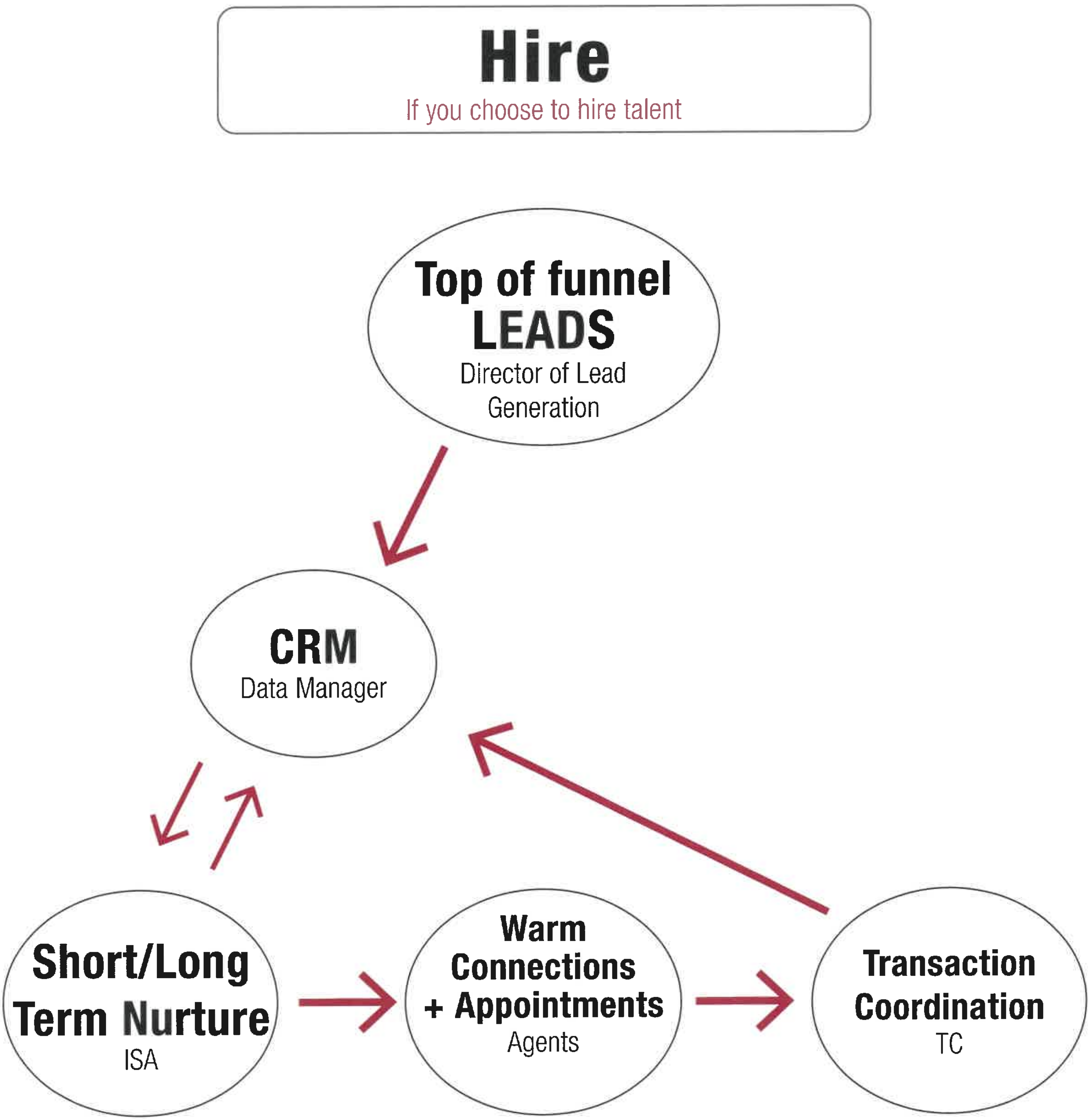
ISA

The Inside Sales Agent (ISA) is a professional relationship maker. This individual is responsible for making first contact with a new lead and following up over time with the appropriate frequency and intensity with the intention of determining "now" business and "future" business.

Transaction Coordination

Ensure every client gets the five star experience with a transaction coordinator to support the influx of business. You can choose to hire a transaction coordinator or leverage vendor partners who can provide transaction coordination as service.

2. Hire to the Organization Chart - The Organization Chart



2. Hire to the Organization Chart - The Organization Chart

Hire it done

If you choose to partner with vendors

Lead Generation

Command, Zillow Apination, facebook Apination, realtor.com Apination, BoomTown! Apination, Real Geeks Apination, BOLD LEADS, homesnap, CINC, market leader, propertybase, BRIVITY Apination, PrimeStreet, Realty.com, RISE, smartzip, CHIME, zurple, Zbuyer, offrs, Qazzoo

Real Estate CRMs

Command, Follow Up Boss Apination, BoomTown! Apination, market leader, Top Producer, CHIME, LionDesk Apination, BRIVITY Apination, propertybase, Wise Agent, CINC, keap, Sierra Interactive

Short/Long Term Nurture

Callers

Conversion Monster, Smart Alto

Print marketing

handwrytten, Addressable, Audience, BRANDco.

Text / Chatbots

Structurely, verse.io

Warm Connections + Appointments

Agent

Transaction Management

Command, SKYSLOPE, LOZIO, jointly, PROPY, BRIVITY Apination, Shaker, TRANSACTLY, amitree, zipForm, milestones, DocuSign, loop Apination, backagent, AuthentiSIGN

Transaction management (as a service)

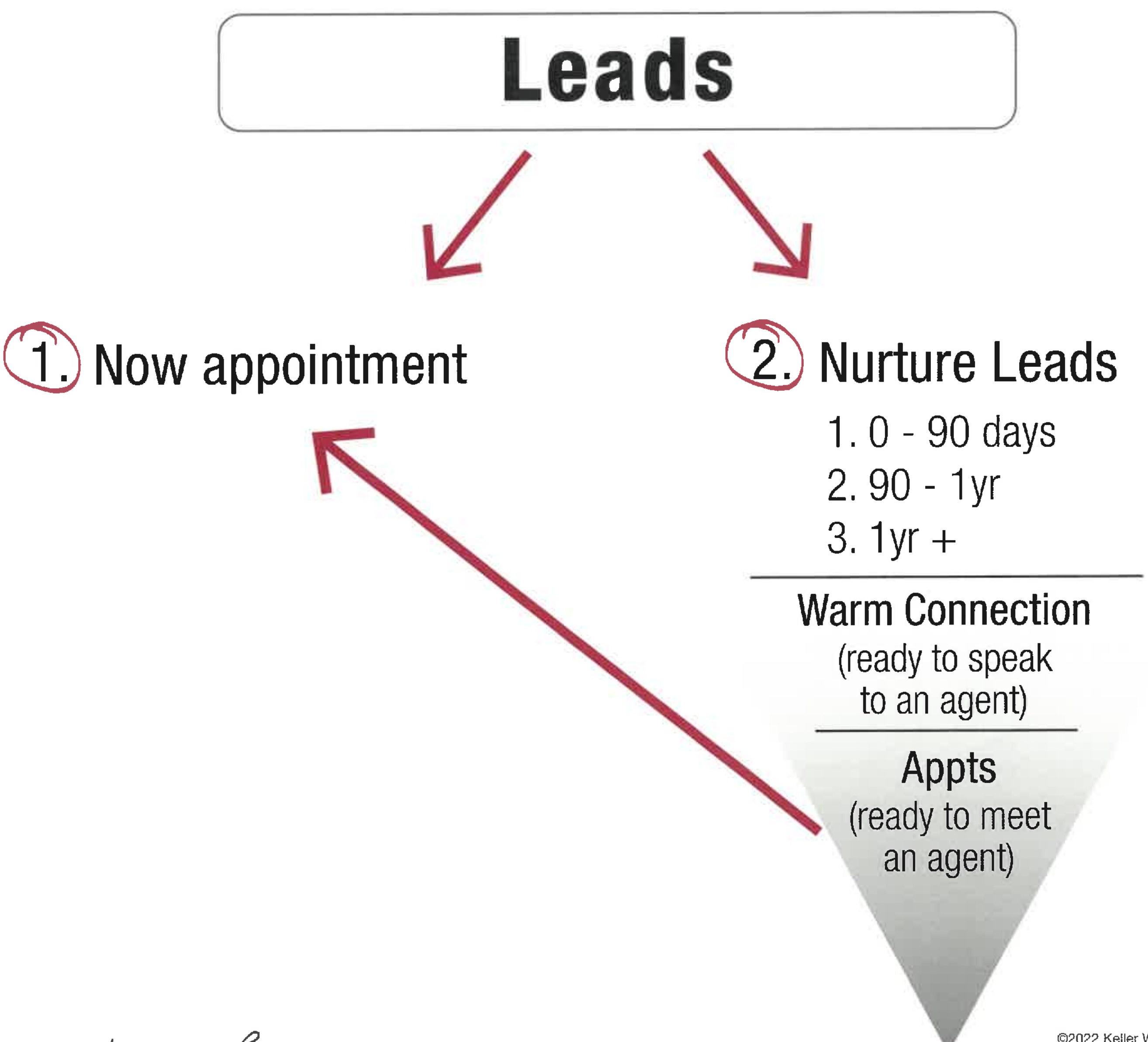
cpros

REALSCALE

3. Qualify the lead

Once a lead is generated, someone needs to qualify them. This means understanding why this person contacted us and when they wish to transact. An ISA qualifies the lead and categorizes each lead as wither "Now Business" or "Future Business." Future business is distributed to agents immediately. Leads that will transact in the future are categorized around their urgency to buy/sell as Hot, Nurture, and Watch clients. Future business leads need to be nurtured and become part of your sales pipeline.

In order to qualify a lead, your ISA will run a "12 Day New Lead" program. This simply means that they make a personal attempt to speak with the lead at least once per day for 12 consecutive days.



4. Identify Agents, Train, and Hold Accountable

At this point the "now/hot" business needs to be routed to an agent.
You need the right agents, with the right skills, and a robust accountability system.

Who is the right agent?

The ideal agent is hungry for business and super responsive. Look for agents in your Market Center who are close to capping or want to cross a goal threshold and eager new agents who are ready to fast-track success. Choose agents who are willing to be moderately tech-savvy with the technology you are using to distribute leads and schedule appointments.

Once you have selected the agents you must to train them and you must hold them accountable.

Train

1. Train your agents on the Laws of the Pipeline. Your Director of Lead Generation facilitates mastery of the dialogues with role model, role play, and real play conversations.
2. They meet weekly with agents in the community and include time each day to practice the conversations agents will be having with their database to address the market of the moment.
3. Establish a Shadowing Program in your Market Center to pair agents who are masters at listing appointments and buyer consults with agents who want to level up their skills. The Shadowing Program should be run by the Director of Lead Generation. Successful agents will perform at their best with an audience and agents who are looking to build their confidence or enhance their skills will learn from the best in your Market Center.

Coach to Accountability in One-on-One Sessions

1. The Director of Lead Generation meets with each agent in the community individually to coach them on opportunities for improvement, strategies to reach their transaction goals, and purposeful lead follow-up. Individual coaching sessions include holding the agent accountable to their personal goals and the Laws of the Pipeline.
2. The Database Rules and Disciplines Coaching Questions:
   1. Are there 100 people or less in their Sales Pipeline?
   2. Are All tasks completed and all contacts have a future task set?
   3. Are All buyer leads have an automated saved search set up?
   4. Are All seller leads have an email task scheduled for a market update?
   5. Let's talk through all Hot buyers and sellers and offer suggestions on how to convert faster.
3. Create a leader board to promote friendly competition and use it as a tool to incentivize both cooperation and competition.

5. Nurture Future Business

All the leads that come into the top of your funnel will fall into two buckets. "Now Business", which is immediately sent to an agent, and "Future Business" which becomes part of the sales pipeline. The sales pipeline is segmented by when the consumer will transact and is governed by the Laws of the Pipeline. Although the main tenants of the pipeline remain the same, The Laws of the Pipeline can be set up and operated in Command in two ways: Tags or Opportunities. Both options are detailed in the following pages.

1. Use personal communication and send real estate information to educate the consumer

2. The Frequency and Intensity depend on how soon they want to transact.

Frequency means how often we attempt to communicate and intensity indicates how strong is the message. The basis of the communication is universal: personal communication and real estate information: properties for buyers and neighborhood information to sellers.

3. Assign leads to stages

HOT

Leads who are ready, able, and willing to transact in the next 90 days get the highest touch nurture in terms of both frequency and intensity. These are your HOT buyers and sellers. Your ISA calls these leads once a week with personal communication to build the relationship and sends timely real estate information. Buyer clients get instant saved search updates; sellers receive a saved search for their neighborhood. If using Command, you can set up a Monthly Neighborhood Nurture Smart Plan.

To set up Saved Searches in Command, reference Tech Play #17.

NURTURE

Leads who want to transact in 90 days to 1 year are in our Nurture group. They are committed to buying or selling and simply need more time. These leads need a Goldilocks nurture: medium frequency and medium intensity. These are your NURTURE buyers and sellers. Your ISA calls these leads twice a month to cultivate the relationship and sends monthly real estate information based on whether they are looking to buy or sell. Buyer clients receive weekly saved search updates; sellers receive bi-monthly updates on their neighborhood.

WATCH

Watch leads are individuals who are more than a year out from a real estate transaction. These buyers and sellers are casually browsing the market at this moment and will need a reason to stay connected. Your ISA will cultivate the relationship with a monthly phone call to build a personal connection. Buyer clients get saved search updates; sellers receive a saved search for their neighborhood.

LEAD POOL or ARCHIVE

There are only two other places a lead can live in the database. The first is the **Lead Pool**. Rule #1 of the Laws of the Pipeline say that no sales agent shall have more than 100 leads comprised of Hot, Nurture, and Watch in their sales pipeline. All other leads, with the exception of leads in **Archive**, reside in the Lead Pool. Over time, the Lead Pool will fill with consumers and should become a fertile prospecting ground for your ISAs and/or sales agents.

The only Leads designated as **Archive** are leads without good contact information or they are on the Do Not Call list.

The next page shows an illustration of the Sales Pipeline.

5. Nurture Future Business - Sales Pipeline

HOT
(0-90 days)

1. Manual Reminder established by Agent/ISA, voice to voice communication minimum once per week
2. Saved Search set - Buyer = instant ; Seller = weekly

NURTURE
(91 days - 1 year)

1. Manual Reminder established by Agent/ISA, voice to voice communication at least 2 times per week
2. Saved Search set - Buyer = as determined ; Seller = every other week

WATCH (1 year +)

1. Calls - voice to voice communication at least 1 time per month
2. Saved Search set - Buyer = as determined ; Seller = monthly

Lead Pool

1. Any lead over the 100 limit in Hot, Nurture, and Watch

ARCHIVE

1. Bad contact info
2. On the DNC list

RULES

1. Max of 100 people in Hot, Nurture, Watch
2. Any leads over 100 can only go to 1 of 2 places
    1. Archive (Bad Contact Information or on the DNC List)
    2. The Lead Pool

5. Nurture Future Business - Laws of the Pipeline

Option #1 - Using Tags for New Lead Flow Process

Tags to Create: 12 DAY PLAN and LEAD POOL

1. Total opportunities in the Sales Agent's Cultivate Stage in Opportunities should not exceed 100 at any time
2. NEW LEADS will have "12 DAY PLAN" tag assigned as they are entered into Command as a "Lead" and shared with agent
3. All Leads with "12 DAY PLAN" tag will be put through the 12 Day New Lead Plan program
4. All Leads with "12 DAY PLAN" tag that have been through the program and have not yet responded are re-tagged with "LEAD POOL"
5. Any lead that states they are "not interested in buying/selling" is re-tagged "LEAD POOL" and eventually Unshared with Agent. Include detailed notes on why transfer occurred
6. If a Lead has bad contact info/no contact info, move to Archive. Must include notes on reason for move to Archive
7. All HOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months Opportunities must have a Checklist Task
8. Checklist Tasks are to be completed on the day assigned. No exceptions. New Checklist Task to be set accordingly
9. All leads insideHOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months must have a "Neighborhood Nurture" SmartPlan
10. An Opportunity is changed from HOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months if it is not NOW business
11. The difference in communication betweenHOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months is frequency and intensity of communication (i.e. more frequent and intentional follow up and more frequent Neighborhood Nurture)
12. If the Agent has more than 100 Opportunities, NURTURE/91 days-12 Months may be transferred to ISA for follow up
13. An Opportunity is moved to APPOINTMENT when the Agent has set an appointment. Rainmaker to determine "Stages" inside each phase
14. An Opportunity is moved to ACTIVE when the client signs an agreement. Rainmaker to determine "Stages'' inside each phase
15. An Opportunity is moved to UNDER CONTRACT when the client secures a home. Rainmaker to determine "Stages" inside each phase
16. An Opportunity is moved to CLOSED when the transaction is closed and funded. Rainmaker to determine "Stages" inside each phase
17. All calls/texts/emails MUST be logged in the Opportunity. If you act outside of Command, you MUST log your interaction. Be Detailed!
18. All "LEAD POOL" tagged leads are to receive Monthly Calls
19. ARCHIVE is only used for leads with bad contact information OR Do Not Call. All other leads should be tagged "LEAD POOL" or better

***Lead = 1 way conversation**	**Tags: 12 DAY PLAN, LEAD POOL**
***Contact = 2 way, permission based conversation**	**Opp. Stages:HOT/0-90 days, NURTURE/91days-12mo, WATCH/12+ mo**

5. Nurture Future Business - Laws of the Pipeline

Option #2 - Using Opportunities for New Lead Flow Process

Tags to Create: 12 DAY PLAN and LEAD POOL

STAGE TO CREATE: in Cultivate - "12 Day New Lead"

1. Total opportunities in the Sales Agent's Cultivate Stage in Opportunities should not exceed 100 at any time
2. NEW LEADS will have an Opportunity created in Cultivate - "12 Day New Lead"
3. All Leads in Cultivate - "12 Day New Lead" will be put through the 12 Day New Lead Plan program
4. All Leads in Cultivate - "12 Day New Lead" that have been through the program and have not yet responded are tagged with LEAD POOL and Opportunity is moved to "Lost"
5. Any lead that states they are "not interested in buying/selling" is re-tagged "LEAD POOL" and eventually Unshared with Agent. Include detailed notes on why transfer occurred
6. If a Lead has bad contact info/no contact info, move to Archive. Must include notes on reason for move to Archive
7. All HOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months Opportunities must have a Checklist Task
8. Checklist Tasks are to be completed on the day assigned. No exceptions. New Checklist Task to be set accordingly
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11. The difference in communication between HOT/0-90 days, NURTURE/91 days-12 Months, and WATCH/12+ Months is frequency and intensity of communication (i.e. more frequent and intentional follow up and more frequent Neighborhood Nurture)
12. If the Agent has more than 100 Opportunities in NURTURE/91days-12 Months, they may be transferred to ISA for follow up
13. An Opportunity is moved to APPOINTMENT when the Agent has set an appointment. Rainmaker to determine "Stages" inside each phase
14. An Opportunity is moved to ACTIVE when the client signs an agreement. Rainmaker to determine "Stages'' inside each phase
15. An Opportunity is moved to UNDER CONTRACT when the client secures a home. Rainmaker to determine "Stages" inside each phase
16. An Opportunity is moved to CLOSED when the transaction is closed and funded. Rainmaker to determine "Stages" inside each phase
17. All calls/texts/emails MUST be logged in the Opportunity. If you act outside of Command, you MUST log your interaction. Be Detailed!
18. All "LEAD POOL" tagged leads are to receive Monthly Calls
19. ARCHIVE is only used for leads with bad contact information OR Do Not Call. All other leads should be tagged "LEAD POOL" or better

***Lead = 1 way conversation**	**Tags: 12 DAY PLAN, LEAD POOL**
***Contact = 2 way, permission based conversation**	**Opp. Stages:HOT/0-90 days, NURTURE/91days-12mo, WATCH/12+ mo**

Laws of the Pipeline Key

1. **New Lead:** This is a new top of funnel and needs to be qualified immediately.
2. **12 Day Plan:** All new leads need to be contacted once daily for 12 consecutive days. A task reminder should be set every day until the lead has been contacted.
3. **Lead Pool:** This is where all leads over 100 in the Hot, Nurture, Watch pipeline reside.
4. **Appointment:** Agent has set an appointment to meet the lead.
5. **Active:** When a lead has signed an agreement.
6. **Under Contract:** When a client signs an executed contract.
7. **Closed:** When the transaction has closed and funded.

Remember, you only need to choose one option to manage your database following the Laws of the Pipeline.

Following the Laws of the Pipeline, you can use
Option 1: System Tags or
Option 2: Opportunity Stages.

Tech Play #17: **Set-up searches**

Agents can create MLS searches with updates from the contact record. These searches can exist in any area with KWLS coverage (US & Canada) & not limited to agent's MLS membership. Create a saved search by neighborhood, zip code, or custom drawn area with a variety of property specific parameters. Set up customer email notifications or let them manage preferences in the connected Consumer experience.

Manages saved searches

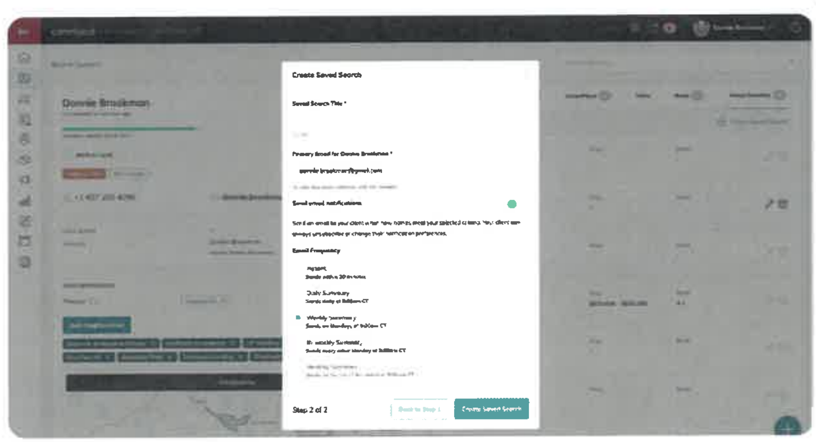
1. Open contact record
2. Click on "Saved Searches" tab
3. View all saved searches
    a. Edit agent created
    b. View consumer created
4. "Create Saved Search" to start a new search

Customize search

1. Search by location - neighborhood, zip code, or drawn area
2. Set property filters: beds, baths, property type, price, amenities, year built, listing status, living area, parking, open house, & price reduced within 7 days

Set email notifications

1. Title the saved search
2. Toggle send email notifications (optional)
    a. Instant (30-minutes), Daily, Weekly, Bi-weekly, or Monthly
3. Consumer can view & customize notifications from connected profile.



6. Manage the Database

As your database grows and you gain Past Clients, you must run a powerful 36 touch program that keeps your Keller Williams Market Center or your branded Lead Generation Company top of mind for every client in the database. Your administrative team utilizes the Tech Plays to maintain the relationship with each client after the transaction with a 36 touch plan that runs continuously until the client indicates they are interested in selling or buying real estate in the next 12 months. When a client raises their hand to transact, the ISA follows the Laws of the Pipeline.

To create Follow Up plans in Command, reference Tech Play #13.

A 36 Touch consists of the following elements:

# of Touches	Description of Contacts	Tech Plays from Crack the Code
12	A combination of twelve mailings, letters, cards, emails, or drop-offs (which might include your business card) and may be one of the following: letter of introduction, your personal brochure, market reports, Just Sold/Just Listed cards, your personal newsletter, recipe cards, property alerts, real estate news or articles, community calendars, invitations, service directories, promotional items, etc.	8, 9, 10, 12, 14, & 31
8	Thank You or Thinking of You cards	14 & 31
4	Telephone Calls	14 & 3
4	Personal Observance Cards (birthdays, anniversaries, Mother's Day, Father's Day, graduation, anniversary of their home purchase, etc.)	14 & 31
4	Holidays (Thanksgiving, Fourth of July, etc.)	1, 10, & 12
4	Client events	8, 1, 11, & 14
36 Touches Total	Every single touch should have a quick reminder and instructions on how to give you referral business and identify the benefits of working with you.	

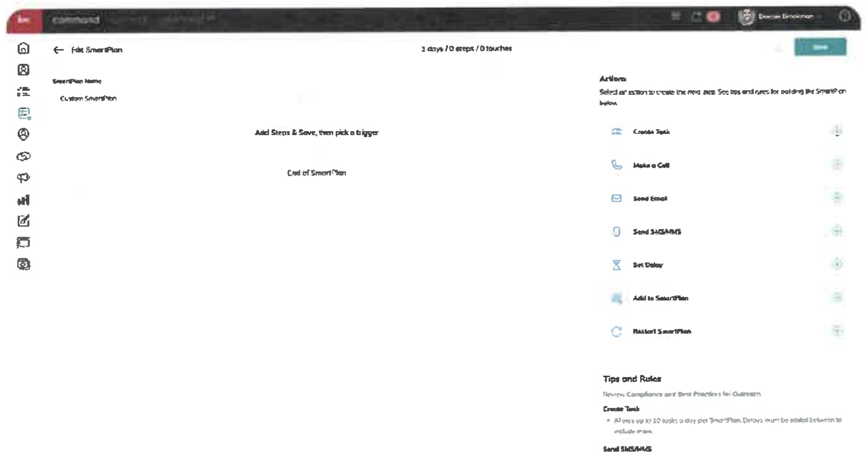
Tech Play #13: **Create Follow Up Plans**

Command's SmartPlans applet provides an extensive library of follow up plans & the ability to create a custom SmartPlan from scratch. Agents can choose to publish custom SmartPlans for all associates to access a copy. SmartPlan steps can be separated with time delays (days), be set to repeat, or trigger another SmartPlan. Custom tag triggers can be added to automate the activation of a SmartPlan.

Manages saved searches

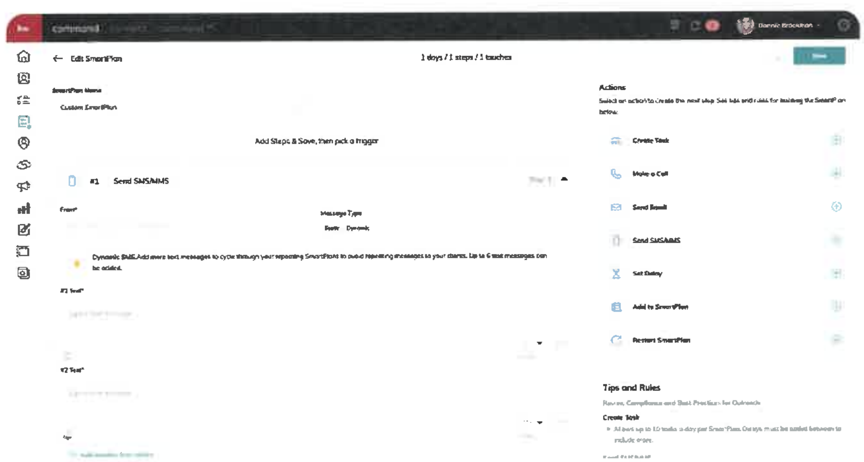
1. Open SmartPlans & choose "Create"
2. Add steps from right to customize plan

*Team's can also designate an assignee for each step - either Rainmaker or Contact assignee.



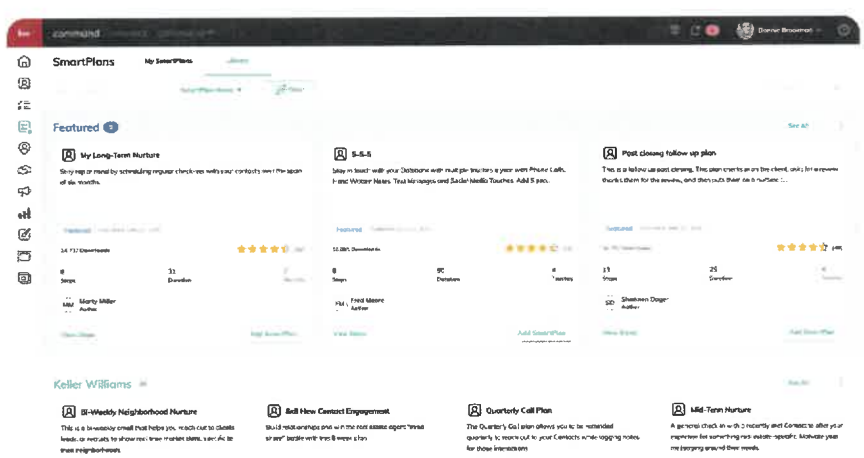
Customize steps

1. Send an SMS Step: Dynamic
   a. Dynamic texting will store up to 5 messages to cycle through as the plan repeats



Browse SmartPlan Library

1. Browse agent & KWRI created SmartPlans
2. Choose "Add SmartPlan" to download a copy to your library



kw *Where Entrepreneurs Thrive*

THE MATH - Case Study #1

Net $100,000

Assumptions:

- Lead Cost: $9/lead @ 100 leads
- 1% conversion rate
- Transaction Cost: $1,100 for Director of Lead Generation, ISA, TC
- 50/50 split with agent

$12,000 GCI

Lead Gen Company or Division		*Agent*
	$6,000	$6,000
- Lead Cost:	$900	- Cap and Royalty
- Transaction Cost:	$1,100	
	$4,000	

$100,000 / $4,000 = 25 units

THE MATH - Case Study #2

Net $500,000

Assumptions:

- Lead Cost: $9/lead @ 100 leads
- 1% conversion rate
- Transaction Cost: $1,100 for Director of Lead Generation, ISA, TC
- 50/50 split with agent

$12,000 GCI

Lead Gen Company or Division		*Agent*
	$6,000	$6,000
- Lead Cost:	$900	- Cap and Royalty
- Transaction Cost:	$1,100	
	$4,000	

$500,000 / $4,000 = 125 units

"Your network is your netWORTH."

"Your database is your business."

"The path is in the math."

Teamerage is the intersection of where these ideas collide. Your Market Center and your agents deserve to share a thriving database. Never before has the opportunity to help more people, fulfill more dreams, and secure a business worth owning been so vibrant. Leave your Brokerage behind and embrace your

TEAMERAGE.