

WHAT IS THE KW CODEBOOK?

In 2017, you decided to lead a revolution in thinking:

- 1. Agent technology should be BUILT BY AGENTS.
- 2. Agent technology should be BUILT FOR AGENTS.
- 3. Agent technology should be OWNED BY AGENTS.

"We discovered that we had real AI all along... AGENT INTELLIGENCE." - John Keller

That simple premise sparked what would become an incredible journey of listening and creating. Today, we have Command, Command Mobile, Connect, and Consumer. At a scale few thought possible, we protect our own data, generate our own leads, create our own workflows, and command our own databases.

You challenged us to teach real estate, not technology. That's exactly what the KW Codebook is.

We interviewed hundreds of the world's highest producing real estate agents and documented their systems and models. They all gave their time and their secrets because that's what Keller Williams agents do: they love and help each other. We made a list of everything they do each day to GROW and RUN their businesses. We took that list and asked "Does Command do that?" and "How would you do that in Command?"

The answers lie in the following pages.

The "How You Do It" page lists actions that help you grow and run your business. Each is assigned a number. These numbers are associated with corresponding Tech Plays that show you how to perform each action in Command.

When you perform the Tech Plays in your preferred order, you end up with your very own CODE to grow and run your business.

This is the place, and this is the technology, built for entrepreneurs to thrive.

KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

WARNING! You must comply with the CAN-SPAM Act when sending emails that advertise or promote commercial products or services, including for B2B emails. The FTC provides guidance on the requirements, including that you must tell recipients how they can stop receiving emails from you. Contact your attorney to ensure your compliance.

KW Where Entrepreneurs Thrive

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WHAT YOU DO

WHAT YOU DO: GROW THE BUSINESS

Database Engagement Expired/Canceled FSBO Door Knock **Open House Client Events** Seminars Pop-Bys Social Ads PPC Farming Real Estate Newsletter/Magazine (printed) Real Estate Newsletter/Magazine (digital) Social Media Post (non-paid) Forced Registration **Reverse BOLD Circle Prospecting** Philanthropy Print Ads

WHAT YOU DO: RUN THE BUSINESS

Make Buyer/Listing Presentations Show Houses/Schedule Showings Pre-Listing work (staging, clean up, etc.) Order Photos/Video Market Listings Write Contracts **Negotiate Contracts** Inspections **Broker Compliance Receive Commission** Vendor Management Attend Training/Get Coaching Track Goals / Progress Manage Money GPS/411 Calendar Connection

HOW YOU DO IT

HOW YOU DO IT: ALL AGENTS

- 1. Make Calls (single)
- 2. Make Calls (bulk)
- 3. Voicemail Drop
- 4. Send Text Messages (single)
- 5. Send Text Messages (bulk)
- 6. Send Email (single)
- 7. Send Email (bulk)
- 8. Lead Capture
- Track & Log interactions (contact/ lead)
- 10. Export Mailing Labels
- 11. Buy Gifts
- 12. Set-up Searches
- 13. Set up Showings
- 14. Run CMAs
- 15. Create Marketing Material
- Create Squeeze Pages/Forced Registration
- 17. Use Marketing Material (pre-made)
- 18. Send Direct Mail
- 19. Post to Social Media (free)
- 20. Run Social Media Ads (paid)
- 21. Create Follow Up Plans
- 22. Use Follow Up Plans
- 23. Manage Daily Tasks
- 24. Create Workflows & Processes
- 25. Use Workflows & Processes
- 26. Prepare Agreements
- 27. Write Contracts
- 28. Compare Offers
- 29. Submit for Compliance
- 30. Submit for Commissions
- 31. Communicate with Vendors
- 32. Register for Classes
- Attend Classes/Learning (Connect/ Help Articles)
- 34. Track Lead Gen Activities

HOW YOU DO IT: AGENT + ADMIN

- AA1 Create Additional User
- AA2 Grant Permissions
- AA3 Delegate Tasks

HOW YOU DO IT: TEAM

- T1 Route Leads
- T2 Reporting for Agents

HOW YOU DO IT: EXPANSION

- E1 Database Visibility across Market Center/State and National Boundaries (Contacts, Activities, etc)
- E2 Combined Reporting/Tracking Lead Gen
- E3 Route Leads across Teams
- E4 Delegate Tasks across Teams
- E5 Grant Permissions across Teams
- E6 Team Marketing Templates
- E7 Team Campaigns

WARNING!

Telephone Consumer Protection Act / Do Not Call

The Telephone Consumer Protection Act (TCPA) regulates calls and texts to cell phones and landlines, autodialed calls, prerecorded calls, faxes, and calls and texts to numbers on Do Not Call (DNC) lists. Class action litigation for TCPA/DNC violations is increasing, potentially exposing agents, Market Centers and KWRI to catastrophic financial damages. Consult an attorney for guidance on the TCPA and DNC laws, including consent requirements, autodialer restrictions and prerecorded messages.

ТСРА

Auto Dialers

The TCPA regulates calls and texts to a cell phone using an "automatic telephone dialing system" (which may include a dialer).

Prior Express Written Consent/ Written Consent

In certain cases, a caller must have prior express consent before making a call. In other cases, prior express written consent is required, including for certain texts. Artificial Voice / Prerecorded Messages Never use artificial voice or prerecorded messages without an individual's prior express written consent. Damages can be \$500 to \$1,500 per violation.

A State Telemarketing Laws

Several states have their own laws governing telemarketing. Talk with your broker about any local and Market Center rules and DNC lists.

DO NOT CALL DO'S AND DON'TS

Under federal law, sellers and telemarketers may not call numbers listed on the Federal Trade Commission's Do Not Call (DNC) Registry. Failure to comply with DNC laws could result in a TCPA class action lawsuit or substantial government fines. Penalties for a DNC violation can total up to \$46,517 per call. Consult an attorney regarding compliance with DNC laws.

✓ Subscribe to the Registry

The DNC Registry is hosted on a dedicated website. Your Market Center should subscribe to the Registry and give you login credentials. Making any telemarketing calls without access to the Registry violates federal law.

Maintain Internal DNC List

Consumers have a right to request that you not call or text them. Consumers can revoke prior consent at any time. Keep a record of Do Not Call requests you receive.

✓ Check Before You Call or Text

Before making a call or text, check to see if the number is on any of these lists: 1) National Do Not Call Registry; 2) state Do Not Call list; or 3) Market Center and agent internal DNC lists. If the number is on any of these lists, do not call or text it.

✓ Honor Do Not Call Requests

Never call or text a number on the DNC Registry or a state DNC list unless you have proper consent. Don't call or text someone who has asked to be on your internal DNC list.

For more information, visit http://www.kwconnect.com/page/industry-resource/dnc

TCPA/Do Not Call Compliance Pointers

Does the Prior Express Written Consent Requirement Apply Under the **Telephone Consumer Protection Act (TCPA)**?



For more information, visit http://www.kwconnect.com/page/industry-resource/dnc

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Command offers two ways to make single phone calls to contacts. Agents can use the click to call option on desktop that initiates a call on connected cell phone/device. Agents can initiate calls on the Command App through their device or WhatsApp (common for international calls). All calls end with prompts to log interactions to contact timeline.



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WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B28 calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodiatier or artificial voice or precorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.





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Make the KW Marketplace your first stop when finding partners that can help you thrive!





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Make the KW Marketplace your first stop when finding partners that can help you thrive!







Agents can send a single text message using their chosen system number (Twilio) through Command on desktop. Texts are automatically logged on contact timeline. Agents can send texts from the Command App through Twilio, their cell phone, or WhatsApp Prompts for adding the activity (cell phone or WhatsApp) will appear after returning to Command App.



SEND A TEXT MESSAGE (COMMAND PLATFORM)

- 1. Open the contact record
- 2. Click on phone number
- 3. Choose "Send Text with Twilio"





COMPOSE MESSAGE

- 1. Compose message
 - a. Include Emojis (optional)
 - b. Include image (optional)
- 2. Verify and send



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zxcvbnm 🕫

Personal (Primary)



SEND A TEXT MESSAGE (COMMAND APP)

- 1. Open contact record
- 2. Tap on "Text"
- 3. Confirm selection
 - a. Send using Twilio
 - b. Send using cell phone
 - c. Send using WhatsApp
- 4. Log Activity
 - a. Cell phone and WhatsApp only



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or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or precorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

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Command allows agents to send bulk text messages through Twilio to **up to 500 contacts at a time.** Agents must comply with the TCPA and ensure that they have proper consent to text each of the contacts.



SELECT GROUP OF CONTACTS

- 1. Use filters and sorting
- 2. Select number of contacts desired

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COMPOSE MESSAGE

- 1. Compose message
- 2. Add image (optional)
- 3. Verify and send

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Agents can send a single email to a contact in Command using their preferred email platform. Clicking on an email address from a contact record will copy the email and redirect the agent to Gmail with the composing email window open. Emails are logged to the timeline if they have their gmail connected in Settings.









Command provides agents up to 5,000 emails monthly with the option to upgrade. Emails can be sent in bulk through an Email Campaign. Email campaigns can use existing templates or custom templates created. Agents can choose to send immediately or schedule for the future. Email lists can be created and saved by contact tags in existing database. Emails campaigns are tracked on individual contact timelines.



CREATE EMAIL CAMPAIGN

- 1. Campaigns Applet > Email Tab > Create Campaign
- 2. Choose Email
- 3. Name the campaign and select a goal





SELECT A TEMPLATE

- 1. Browse existing templates
- 2. Create new template from scratch





CHOOSE EMAIL LIST

- 1. Choose previously saved list
- 2. Create new list
- a. Filter contacts by tag







Command provides agents up to 5,000 emails monthly with the option to upgrade. Emails can be sent in bulk through an Email Campaign. Email campaigns can use existing templates or custom templates created. Agents can choose to send immediately or schedule for the future. Email lists can be created and saved by contact tags in existing database. Emails campaigns are tracked on individual contact timelines.



SEND EMAIL CAMPAIGN

- 1. Send immediately
- 2. Schedule send (optional)





TRACK CAMPAIGN PERFORMANCE

- 1. Track emails sent, opens, and clicks
- 2. Click on email campaign for detailed metrics:
 - a. Who sent, delivered, opened, clicked, unsubscribed, not sent, and not opened

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UPGRADE COMMAND EMAIL

- 1. Agents receive up to 5,000 emails complimentary
- 2. Upgrade for additional monthly emails (optional)

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Leads can be added to KW Command manually, file import, from another CRM/Technology provider through API Nation, or captured from the associated consumer experience.



CONTACT IMPORT

- 1. Open Command > Contacts
- 2. Select "Import"
- 3. Download template or upload a custom file
- 4. Map fields
- 5. Continue to Import

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CONSUMER LEAD CAPTURE

Leads captured from KW agent sites & mobile app will be mapped to Command > Contacts. Command's Campaigns applet also has social ad lead capture forms built in.

	Feed Your Agent Cog in Si	in Up
Sign Up To See More Properties	Sign Up	
Revisit and receive timely updates on your searches	First name	
Collaborate with your KW Agent or Co-buyer on properties that best fit your needs	Last name	
 Follow neighborhoods to see meaningful market data and price trends 	Email address	
 Gain access to the world's largest off-market property network through your KW agent 	Password •	
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API NATION [MARKETPLACE]

API Nation can be purchased in the Marketplace to bidirectionally sync contacts between Command and 22 popular systems. Options range from Google, iCloud (Apple), Realtor.com, Zillow, and more.







Agents can log calls, texts, meetings, emails, or leave notes on a contact record in Command. This can be done individually form the contact record on desktop or on the Command App. Agents can also log activity for multiple contacts using a bulk action. Many activities are automatically logged on the agents behalf from a SmartPlan or completing task activity.



ADD ACTIVITY

- 1. Open contact record
- 2. Choose blue + button
- 3. Choose Add Activity [\$] button
- 4. Change activity type
- 5. Set date
- 6. Add notes/details
- 7. Confirm "Add Activity"





ADD ACTIVITY (BULK)

- 1. Open contacts
- 2. Filter and select desired contacts
- Choose "Add Activity" in bulk actions dropdown
- 4. Change activity type
- 5. Set date
- 6. Add notes/details
- 7. Confirm "Add Activity"







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#10 EXPORT MAILING LABELS



Agents can download mailing labels ready to print up to 500 contacts at a time. Mailing labels can either be exported in a PDF and ready to print or in a spreadsheet for a custom mail merge.



BULK EXPORT MAILING LABELS

- 1. Filter contacts
- 2. Select desired contacts
- Choose "Export Mailing Labels as PDF"
 a. Print ready file
- 4. Choose "Export Mailing Labels"
 - a. Spreadsheet ready for custom mail merge





DOWNLOAD FILE

- 1. Click notification bell
- 2. Tap "Download" for export notification





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Make the KW Marketplace your first stop when finding partners that can help you thrive!







Agents can create MLS searches with updates from the contact record. These searches can exist in any area with KWLS coverage (U.S. and Canada) and 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

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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, and 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, biweekly, or monthly
- Consumer can view and customize notifications from connected profile.







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Make the KW Marketplace your first stop when finding partners that can help you thrive!







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Make the KW Marketplace your first stop when finding partners that can help you thrive!



#15 CREATE MARKETING MATERIAL



Command's Designs applet allows agents to customize hundreds of social or print design templates. Preferred materials, DBA logo, headshot, & team images can be saved as custom assets. Select collections offer design automation. Choose open house collection, select listing, provide open house details, confirm agent info, and create six different templates automatically.



#16 CREATE SQUEEZE PAGES (FORCED REGISTRATION)



Agents can set required registration settings for their agent site based on the number of properties a consumer views. Options range from unrestricted to no property viewing. **Visitors will be prompted to register or sign-in after hitting the property view limit set by the agent.** Individual landing pages can wbe created through Command's Consumer applet with a variety of widgets.





CUSTOMIZE PAGE

Add desired widgets
 Configure widgets

3. Save Landing Page or Publish Page



#17 USE MARKETING MATERIAL (PRE MADE)



Command offers a variety of "ready to use" marketing pieces. HTML Email Templates, Social Media Posts, Direct Mail, & SmartPlans are some examples.



#18 SEND DIRECT MAIL



Agents can use the Campaigns applet to send direct mail campaigns. Agents can choose from auto-populating various templates with listing data or upload a custom post card. The Designs applet has several templates perfectly sized for the custom option. Detailed targeting options allow agents to narrow down the audience. Our partner (Real Mailers) will print, apply postage, and ship on behalf of agents fulfilling orders submitted prior to 3 p.m. the same day.



CREATE DIRECT MAIL CAMPAIGN

- 1. Campaigns > Create Campaign > Direct Mail
- 2. Choose Listing
 - a. Images, Description, and property details will be used to auto-fill template





CUSTOMIZE CAMPAIGN

- 1. Confirm Content
 - a. Template or Custom Design
 - b. Listing Details (auto from MLS)
 - c. Listing Photo
 - d. Agent Details (auto from marketing profile)
- 2. "Configure Targeting"





CONFIGURE TARGETING

- 1. Adjust filters and map to find target audience
 - a. # of Homes
 - b. Bedrooms
 - c. Sqr Footage
 - d. Year Built
 - e. Year last Sold
 - f. Last sold For \$
- 2. "Next" to confirm payment and begin processing



#19 *POST TO SOCIAL MEDIA FREE*



Create and manage organic reach social media posts through Facebook, Twitter, or Instagram. Media can be uploaded directly from the agents computer or pulled from Designs. Agent's can share ready-to-go "Quick Posts" directly to social platforms with no required editing.





SCHEDULE POST

- 1. Schedule post by date/time
- 2. OR Publish immediately
- 3. Confirm selection



#20 RUN PAID SOCIAL MEDIA ADS



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



c. Upload directly from computer

#20 RUN PAID SOCIAL MEDIA ADS (CONT.)



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

0

Create Campaign

• Feed



SOCIAL SETTINGS

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



LEAD SETTINGS AND 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 and leads captured
- 2. Duplicate an ad
 - a. Duplicate and run
 - b. Customize and run



#21 CREATE FOLLOW-UP PLANS



Command's SmartPlans applet provides an extensive library of follow up plans and 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.



CREATE A SMARTPLAN

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

*Teams 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 five messages to cycle through as the plan repeats

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#2 Text*				
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BROWSE SMARTPLAN LIBRARY

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

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WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B28 calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warantiles, either express or implied, with negard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.





SmartPlans can be applied to contact records individually and in bulk through multiple paths. Options for scheduling the start date of the SmartPlan are available. Stagger start is optional when adding contacts to a SmartPlan in bulk. Stagger start helps manage the number of daily tasks/calls. SmartPlans can be triggered by adding a contact tag and individually set from the Command App.



ADD TO SMARTPLAN (BULK)

- 1. Open Contacts and filter to desired list
- 2. Select contacts
- Choose "Add to SmartPlan" from bulk action menu
- 4. Select SmartPlan
- 5. Choose Start immediately, schedule to start, or stagger start





CONTACT TAG TRIGGER

- 1. Create or open an existing SmartPlan
- 2. Choose "Add Trigger"
- Add/create contact tag that will trigger the start of SmartPlan when added to contact





SMARTPLANS (COMMAND APP)

- 1. Open contact record
- 2. Select blue + button
- 3. Choose "Add to SmartPlan"

OR

- 1. Tap on "SmartPlans" tab
- 2. Choose blue + and select SmartPlan



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WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance. KVMI makes no warranise, either express or implied, with regard to the information and programs presented in these materials. KVMI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KVMI.





Command's tasks applet helps agents stay on top of daily tasks. Tasks can be related to a contact, opportunity (transaction), or general. Tasks created from SmartPlans and Opportunity checklist templates will appear in the tasks applet. Team rainmakers can manage tasks for themselves and team members. On the go, agents can quickly see what is due today, soon, or past due using the Command App. The Command App can be used by agents to complete, reschedule, or delete tasks.



MANAGE DAILY TASKS

- 1. See contact tasks or opportunity tasks using tabs
- 2. Check off tasks to complete a bulk action (complete/reschedule)
- 3. Check off tasks when done
- 4. Filter by due date or priority

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CREATE A NEW TASK

- 1. Tap "Create New Task" button
- 2. Associate contact(s) (optional)
- a. Will log to contact's timeline
- 3. Provide task description
- 4. Determine priority level
- 5. Due date + time
- 6. Add hyperlink (optional)
- 7. "Create Task"





MANAGE DAILY TASKS (COMMAND APP)

- 1. View Due Today, Soon, and Past due on dashboard
- 2. Click tasks applet to filter specific tasks by status or due date
- 3. Use menu to edit, complete, reschedule, or display associated contact
- 4. Use blue + to create new task



#24 CREATE WORKFLOWS AND PROCESSES



Agents can create custom workflows & checklists for Opportunities (transactions) to track on their Sales Pipeline. Checklist can be managed from a template level and included in a Client Update. Client updates can be turned on for each opportunity (optional) to send a daily summary of items completed to customer(s).



VIEW SALES PIPELINE

1. Open Opportunties applet

This pipeline is broken down into five phases for Listings, Buyers, and Leases. Agents can visually track their business. Each phase can have custom stages to track in more detail.





ADD / EDIT STAGES

- 1. "Add New" stage in top right
- 2. Edit name
- 3. Edit probability to help forecast GCI (conversion rate)
- 4. Edit checklist templates

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EDIT CHECKLIST TEMPLATE

- 1. Add item
- 2. Include in Client Update (optional)
- 3. Save changes



25 USE WORKFLOWS # 🗖 **AND PROCESSES**



As an agent moves the Opportunity through the stages and phases of their sales pipeline, checklist templates can be applied. Assign due dates for tasks to populate in the Tasks applet on desktop and in the Command App. Teams can assign these tasks to various members to leverage the work.





- 1. Mark items as complete
- 2. Change "Client Update" status
- 3. Add individual tasks
- 4. Schedule due dates

Tasks are assignable for teams.

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		View Opportunity Details			

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#26 PREPARE AGREEMENTS



👹 Donnie Brackman -

Command offers integrations with DocuSign and Dotloop to easily prepare agreements. This connected DocuSign Room/ Transaction Loop will remain attached to the Opportunity to streamline compliance and document storage in the agent's preferred partner. Transaction details are sent to respective platform to help auto-fill documents. Opportunities is also connected to CommandMC > Opportunities for compliance and commission approvals.



START A TRANSACTION

- 1. Opportunities > Create Opportunity
- 2. Documents Tab > Start a Transaction
- 3. DocuSign or Dotloop agent's choice

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SYNCING DETAILS

- 1. Command will sync Opportunity details to help auto-populate agreements
 - a. Name(s), Email(s), Agent(s), Address, Price, Legal Description (MLS)





AGREEMENT AUTO-FILL

 DocuSign Forms will map respect details and assign (initials/signatures) recipients with contact name/email







🕼 💶 👹 Donnie Brackman + 🕐

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START A TRANSACTION

- 1. Opportunities > Create Opportunity
- 2. Documents Tab > Start a Transaction
- 3. DocuSign or Dotloop agent's choice

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SYNCING DETAILS

- 1. Command will sync Opportunity details to help auto-populate agreements
 - a. Name(s), Email(s), Agent(s), Address, Price, Legal Description (MLS)





AGREEMENT AUTO-FILL

 DocuSign Forms will map respect details and assign (initials/signatures) recipients with contact name/email







Opportunities in Command allows agents to add and track multiple offers. The Offer Comparison can be downloaded as a PDF or emailed to seller(s). Offers initiate the commission workflow.



ADD NEW OFFER

- 1. Opportunities > Opportunity record > Offers & Commissions tab
- 2. Choose "+ Add New Offer" Name the offer and add details





VIEW ALL OFFERS

- 1. View and select multiple offers
- 2. Choose "Compare Offers"





VIEW OFFER COMPARISON

- 1. Preview offer comparison
- 2. Download PDF offer comparison (optional)
- 3. Email offer comparison to seller(s) (optional)

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	Cosh	\$50,000.00	\$20,000.00	\$60,000.00			
	Finance Amount	\$250,000.00	\$280,000.00	\$230,000.00			
	Earnest Money	\$5.000.00	\$0.00	\$0.00			
	Option Fee	\$0.00	\$0.00	\$0.00			
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#29 SUBMIT FOR COMPLIANCE



Command provides a collaborative workspace between Agents and MC Leadership to manage transaction compliance approvals. Agents can attach documents from multiple sources to organized checklists created by their MC. Documents can be required, continually required, or optional. The compliance tool includes a built in PDF merge/split, secure document export, and instant messenger options for teammates + MC leadership.



ATTACH FILES AND SUBMIT

- 1. Review required, conditional, and optional documents as chosen by MC
- 2. Attach files to compliance checklist from DocuSign/Dotloop or computer
- 3. Submit for approval
- 4. Monitor notifications for updates

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MESSAGE MC LEADERSHIP

- 1. Open comment section of compliance folder with message icon
- 2. Compose and send messages
 - a. Use @ to mention/notify individual Team members and MC leadership





SPLIT AND ATTACH PAGES

- 1. Open Split and Attach feature
- 2. Select or upload document(s)
- 3. Split/Attach pages as needed



#30 SUBMIT FOR COMMISSIONS



Accepting an offer for an Opportunity will provide agents the ability to manage and submit commission requests. Add co-brokers, team members internally, deductions, inside/outside referrals, and track your cap status. Notes to the commission approver can be added prior to submitting. Commissions can be approved and imported into MORE system by the MCA. Disbursement Authorizations (paid at table) can be added back to Opportunity by MCA with notification (optional).





ADJUST COMMISSION DETAILS

- 1. Edit agent payment details
- 2. Add an agent (optional)
- 3. Add co-broker (optional)
- 4. Track cap status
- 5. View 1099 income details
- 6. Submit for approval





RECEIVE DA

1. MC Leadership can optionally share the Disbursement Authorization for agent to be paid at table with chat notification.



#31 COMMUNICATE WITH VENDORS



KW Agents can select their preferred Keller Mortgage officer on KellerMortage.com. This officer will be linked to all incoming preapproval request to purchase or refinance a home. Connections are in the consumer experience and available in select SmartPlans. The link can also be shared directly through single/bulk text messages.







KWU's Tech Training Team offers a variety of training options for agents, operations, and leaders to engage with Command.



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#33 ATTEND CLASSES/ LEARNING



Agents can access guided tours, KWU articles with step-by-step instructions, or browse self-guided learning paths. Guided tours are built by applet/experience and will guide an agent directly in Command. Our knowledge base at **answers.kw.com** has an extensive library of how-tos and step-by-step instructions for all things KW tech. KW Connect offers self-guided learning paths helping to connect the "why" behind our suite of technology tools.



#34 TRACK LEAD GEN ACTIVITIES



AgentS can track their lead generation activities in two ways using Command. First, the reports applet will display contact health score and logged activities like calls, texts, or meetings. Agents can also turn on Activity Tracker. This will send a daily reminder based on the desired schedule (off days/holidays) to log daily activities and mood. Rainmakers can view this at a team level.

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LEAD GEN REPORTS

- 1. Open the reports applet
- 2. See database overview and last contacted on dashboard
- 3. Look on the "Reports" tab for a more detailed database report



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SET ACTIVITY TRACKING

- 1. Open Settings > Command > Reports > Activity Tracker
- 2. Schedule daily emails and desired reminders
- 3. Select default work days
- 4. Select holidays
- 5. Scroll and set agent specific days/holidays (teams only)





VIEW ACTIVITY TRACKING

- 1. Open Reports and Activity tab
- 2. See profile photos for all submitted activity each day of current week
- 3. View Summary of total team activity
- 4. View breakdown of activity by team member



WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

#AA1 CREATE ADDITIONAL USER



The initial request to add a user for KW Command will start with Market Center Leadership. Team accounts can be created to support Solo Agent + Admin(s), Teams + Admin(s), & Groups + Admin(s). Users will be considered KW associates and have full profiles. Guest Users are available for non-associate accounts and limited at 2 per organization. Guest Users can be denied/removed by MC leadership, if needed.



ADD MEMBER

- 1. Open Command > Settings > Team Management
- 2. Choose "Add Member"
- 3. Select option
 - a. Team Member (KW Associate)
 - b. Guest User (not KW



#AA2 GRANT PERMISSIONS



KW Command offers three levels of permissions for team members. Initial permission settings will be set by the members role assigned by MC leadership. Rainmakers will default to Unlimited and be able to adjust permission settings for all team members. Standard is recommended for agent team members, enhanced is recommended for administrators, and unlimited is recommended for team owners.



TEAM MANAGEMENT

Here are short descriptions of the three permission levels: Standard, Enhanced, and Unlimited.





FULL PERMISSIONS BREAKDOWN

View the full permissions breakdown for each applet and feature by Standard, Enhanced, & Unlimited

	General Settings	^	Team Management	Full Permissions Breakdown				×	
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#AA3 DELEGATE TASKS



Tasks that are associated with contact records, transaction records, or independent can be assigned/reassigned to any team member in Command individually or in bulk. Tasks populated on an Opportunity (transaction) checklist can be assigned to any team member.

\rightarrow

ASSIGN TASKS

- 1. Open Command > Tasks
- 2. Click "Create Team Task"
- 3. Use "Assignee" option to select another team member

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BULK REASSIGN

- 1. Open Command > Tasks
- 2. Select desired tasks
- 3. Choose "Reassign" bulk action
- 4. Select team member using dropdown
- 5. Confirm with "Reassign Tasks"





ASSIGN OPPORTUNITY TASKS

- 1. Open Command > Opportunities
- 2. Select opportunity task list
- 3. Choose "Assign To"
- 4. Search or select team member to assign







Agents can set up multiple lead routes to accommodate a variety of lead sources, rules, & schedules. Create and prioritize routes by the desired schedule using one of five rules available. Set the claim action deadline to increase your speed to lead. Routes can include all or a selection of agents.



CREATE LEAD ROUTE

- 1. Open Command > Settings > Contacts > Lead Routing
- 2. Select "Create Route"
- 3. Add title & set routing rule
- 4. Set route schedule
 - a. Day of week and times
- 5. Set claim action deadline
- a. days, hours, minutes, seconds
- 6. Select lead source(s)
- 7. Select Agent(s)
- 8. Confirm "Save"



RULES

Random - randomly distributes leads to each team member included in the route. Every agent has an equal chance of getting the lead, but no agent will be the first person to get a lead, twice in a row.

Weighted Random - create a lead distribution ratio between team members, ensuring that some agents get more leads than others. Later in the process, you will give each team member, included in the route, a percentage amount that will cumulatively equal 100%. These percentages are calculated as probabilities for leads to be randomly distributed to these agents.

Jump Ball - every team member in the lead route will receive the lead. The first person to claim it, gets it.

Round Robin - sends leads to agents in an ordered list. If an agent doesn't claim the lead in the allotted time, it will go to the next agent on the list. If none of the agents claim the lead, it will be sent to the Lead Pool.

Assign to Agent - you will set one agent, from your team, on this route. All leads from the lead sources in the route, will be automatically assigned to this agent, without them having to claim them. This route will override any other lead routes that contain the same lead sources and date/time designation.





Command offerings reporting for agents around database health, opportunities (transactions), goals, emails, and texts/calls (Twilio).



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DATABASE VISIBILITY ACROSS MARKET CENTER/STATE AND NATIONAL BOUNDARIES



Rainmakers or admin from Expansion organizations can be added to spoke locations if MC permits. This would provide visibility into the team accounts, database, pipelines, and reporting. The view would not be a combined view.



VIEW TEAM ACCOUNT DATABASE

This current view is of the team database. Additional team locations will be included in this dropdown under "Other Accounts" if available. A team account will represent each additional spoke location.

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AJ Pitzpetrick	Des 04, 2020 Dynami agoj Marri 18, 2020 Di yeon agoj	+1.574 274 3080	(50 days upp) per 02, 2022	over 18, 2021	ojitz54@gmail.com		
Alan Grunt	No. 2020 (2 years ago)	+1.607.434.0388	May 26, 2022 (4 months a po)	Over 13, 2021 In your oppi	gnat@twc.com		
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#E2 COMBINED REPORTING/TRACKING



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#E3 ROUTE LEADS ACROSS TEAMS



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#E5 GRANT PERMISSIONS ACROSS TEAMS



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