

AGENT TOOLKIT

PRODUCTIVITY TOOLS FOR SOLO AGENTS



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Know Your Prospecting and Marketing Methods

Prospecting

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

Both

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

Marketing

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

Prioritize Your Lead Generation Efforts

Instructions:

1. Use the first box to list all of the different sources you get your leads from. This list does not need to be in any particular order.
2. Next, use the second box to list your lead sources from most productive (top of the list) to least productive (bottom of the list).
3. Finally, use the third box to record your top 5 lead sources. This is where you will focus your efforts.

**List Lead
Sources**

**Order Lead
Sources**

**Record Top 5
Lead Sources**



Lead Generating with Your Sphere

Your sphere is a subset of your database whom you expect to do business with or get referrals from regularly. They are people who know, like, and trust you AND help you grow your business.

Identify your sphere of influence, engage them with a touch campaign, and ask them for business!

Click on the **i** to access the help article for the SmartPlan.

1. In Command, tag anyone who:

- Has given you a referral in the past year.
- Is a repeat client, or you expect to be a repeat client.
- You have strong ties to, like your close friends and family members.
- Shares your social media posts and participates in marketing campaigns frequently.
- Is influential and has a large network or sphere themselves.

2. Put these contacts on the 36 to Convert Touch Campaign:

4 Touches Quarterly calls (leverage the Quarterly Call SmartPlan in Command) **i**

26 Touches Bi-weekly email offering some type of information of value to the consumer **i**

2 Touches Events, get togethers, parties

4 Touches Promotional direct mail, such as a magnet, calendar, market report, etc. **i**

3. When speaking to your sphere, do the following:



Educate

Remind your sphere that you're in real estate and good at what you do



Ask for Referrals

Ask for permission to contact someone they know



Reward

Reward your sphere for giving you referrals and when a transaction closes

4. Add touches that feel unexpected and personal with your sphere on top of that:

- Give a personalized gift.
- Meet with them.
- Host an exclusive event for your sphere or those that give you a referral.
- Call or text to provide information relevant to that person.

Set a Strategy for Online Advertising

6 Best Practices for Online Advertising Lead Generation



1. Grab Attention

- Use positive framing, avoid negative messaging

2. State a Problem

- Example: “Why rent when you can own?”
- Identify yourself as the resource they need to solve the problem

3. Provide a One-Click Solution

- Include a hook that necessitates clicking on the link (e.g. “Check out the outdoor dining space” but do not include images of the outdoor space in the ad)
- Avoid too many questions. More than 4 questions causes fatigue and reduced engagement

4. Be Visible

- Make it easy for the consumer to identify where to click/interact through large text, placement, and strategic use of color

5. Capture Leads

- Create custom Landing Pages in Command for the listing ⓘ
- Utilize the lead capture form available in the platform (e.g. Facebook)

6. Follow Up

- Follow up with the lead within 5 minutes ⓘ

Create and Deploy Campaigns in Command

Accelerate your lead generation using Campaigns in Command

Follow the steps below to develop an effective strategy for using social media campaigns to deliver leads directly to your pipeline.

Click on the **i** for any step or task to access the help article for that task

Create a Social Media Marketing Design

Add content to your Design

3. Build a Custom Landing Page **i**

Create a custom Landing Page for your listing

2. Name and save your custom landing page




Create and Deploy Campaigns in Command

Accelerate your lead generation using Campaigns in Command

Instructions continued from the previous page.

4. Update Your SmartPlans

Create SmartPlans relevant to the listing

- Create a Monthly Neighborhood Nurture based on the listing in the ad 
- Create a 12 Days of Gain SmartPlan 
- Add the Quarterly Call SmartPlan to your My SmartPlans list 

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5. Construct Your Campaigns

- Create a campaign for you listing 

Configure your channels for your social ad Campaign

1. Configure your Campaign for the intended platform 

Create and Deploy Campaigns in Command

Accelerate your lead generation using Campaigns in Command

Instructions continued from the previous page.

5. Construct Your Campaigns (continued) ⓘ

2. Add the follow-up destination URL (leverage the custom landing page you created ⓘ)

Ads run on Facebook use Facebook's lead capture form. Once they have submitted that information, you can direct them to your custom landing page

3. Select the SmartPlan for leads generated from the Campaign

You must create the SmartPlans prior to creating the Campaign to automatically assign the lead.

1. Determine the duration and budget for your social ad
2. Preview your ad, save, and publish

6. Follow Up ⓘ

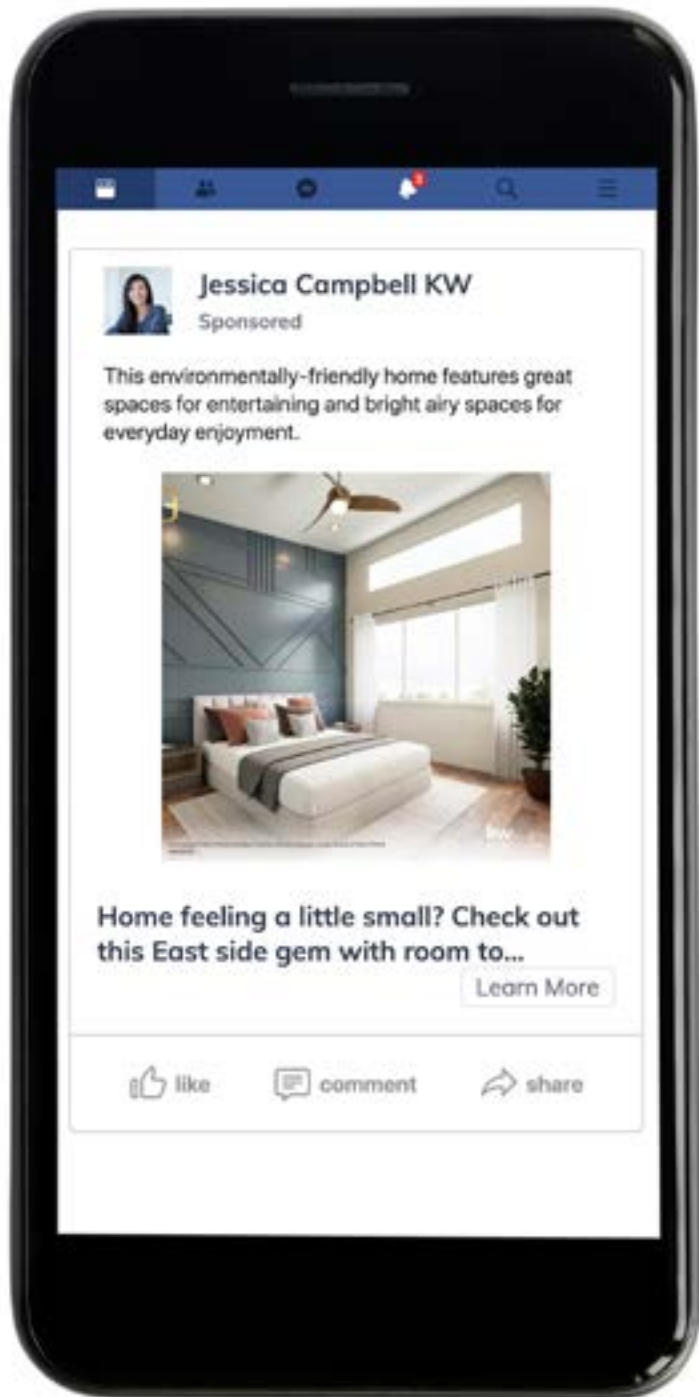
Add Leads to additional SmartPlans

- Track your return on investment

Use Facebook for Lead Generation

Make your Facebook ad stand out with these tips

Create eye-catching visuals for photo ads



1. Use high-resolution images

- Opt for a 1:1 square aspect ratio
- Choose a photo with a width of 320 pixels or higher

2. Create a single focal point in your images

3. Incorporate contrasting colors to encourage users to pause on your ad

4. Follow the rule of thirds

- Turn on the 3 x 3 grid setting on your camera
- Frame your photo with the focal point at the intersection of 2 lines

5. No more than 20% of the image should include text

Grab attention with video

1. Keep videos short

- Opt for 15 seconds or less
- Front load compelling content, create interest in the first 3 seconds

2. Use a vertical or square video for best viewing on a phone

- Videos taller than a 4:5 aspect ratio may be masked

3. Design for sound off by incorporating graphics or captions

Use Open Houses for Lead Generation

Use the chart below as a guide for how to use open houses to generate leads.

	Before		During		After
Who to contact	1. Database	1. Neighbors 2. Nearby Renters	1. Database	1. Face-to-Face Visitors	1. Face-to-Face Visitors
What to do	1. Invite to open house 2. Ask for referrals		1. General prospecting	1. Get appointments 2. Ask for referrals	1. Get appointments 2. Add to database
How to reach them	1. Call 2. Email/Text 3. Social Media	1. Door-knocking	1. Call	1. Talk 2. Build rapport	1. Call 2. Email/Text 3. Handwritten note 4. Add to SmartPlan

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Plan an Open House



Prepare: Once you have made the decision to host an open house, promotion starts a week out. Set yourself up for success 7-10 days in advance

Example Schedule:

Day	Activities
Monday	Select your open house listing or volunteer to host an open house for someone in your Market Center, and review the Open House Countdown Checklist
Tuesday	Post online, generate call list, and call 25 neighbors.
Wednesday	Post online, install the KW Mobile Search App on your phone, and put a sign in the yard
Thursday	Post online, invite database, return yard-sign calls, and email property-based internet leads
Friday	Post online, prepare market stats and comps (print and digital), print open house fliers.
Saturday	Post online, place directional signs, door knock the neighborhood (use script when door is answered, leave flier if unanswered)

Plan an Open House

Plan out your preparation by day:

Day	Activities
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

Create Your Open House Protocol

Create and print 2 copies of your open house protocol for guests. Post your protocol clearly outside the property and at your PPE station.

- 1. Research local and state/province regulations for guidelines**
 - [State Health Departments \(United States\)](#) ⓘ
 - [Provincial and territorial resources for Covid-19 \(Canada\)](#) ⓘ
 - [National Association of Realtors](#) ⓘ
 - [Canadian Real Estate Association](#) ⓘ
- 2. Contact the Home Owners Association for policies regarding common spaces and Covid-19 (if applicable)**
- 3. Request guests self-screen for Covid-19**
 - [CDC symptoms list and downloads](#) ⓘ
 - [Canadian Public Health Services resources](#) ⓘ
- 4. Include rules on how many guests may enter the home at one time**
 - Follow local and state/province guidelines
 - Provide directions and signage for queuing
- 5. Clearly state what PPE is required while touring the property**
 - Provide disposable PPE for guests
- 6. Describe the preferred flow of traffic through the property to facilitate social distancing**
- 7. State the no touching rule and remind guests to request assistance for opening any doors, cabinets, or storage areas**

Open House Countdown Checklist

3 days before the open house

- Research local and state/province regulations regarding Covid-19 precautions and contact tracing requirements
- Confirm date/time of open house with listing agent
- Print a map of the neighborhood surrounding the open house (5 mile radius)
- Research sign-placement regulations (HOA, city, country, etc.)
- Order 10 helium balloons
- Get 1 yard sign with rider
- Get 10 directional signs with riders
- Print 100 flyers (include map)
- Role-play your scripts with a partner
- Mark on a map where you'll place signs
- Print 2 copies of your open house protocol for guests (include self-screening information related to Covid-19)

2 days before the open house

- Knock on 100 doors in neighborhood to invite neighbors; leave a flyer at each door
- Advertise the open house on social media
- Role-play your scripts with a partner
- Compile information on "alternative" properties. Print 5 copies of each.
 - 2-3 properties in a lower price range
 - 2-3 properties in a higher price range
 - 1-2 properties with one more bedroom
 - 1 condominium
- Print two blank contracts (just in case you meet a motivated buyer)
- Put together a home book to display at the open house
 - Property photos
 - Details of property
 - Tax information
 - Survey of lot
 - Floor plans
 - School information
 - Community information

1 day before the open house

- Assemble your showing kit.
 - Surface sanitizing wipes
 - Disposable face masks
 - Hand sanitizer
 - Disposable shoe covers
 - Bottled water
 - Notepads
 - Flashlight
 - Toilet paper
 - Tape measure
 - Level
 - Paint, flooring, shingles samples
 - Coloring pages and individual packets of crayons for children
- Review floor plan and decide where you'll set up your desk and your PPE station
- Print a guest register and write in two fake names
- Role-play your scripts with a partner
- Print contact tracing forms and/or Covid-19 release forms if required

Open House Countdown Checklist

The day of the open house

Before the open house starts:

- Arrive early to ensure the home smells and looks clean and welcoming
- Open all shades and drapes
- Open windows (if weather permits)
- Turn on all lights
- Open interior and closet doors
- Wipe counters, sinks, and surfaces that guests might touch
- Ensure valuables, breakables, and prescriptions are safely hidden
- Role-play scripts with a partner
- Bring work to stay productive during down time (e.g. blank note cards, phone, your database)
- Post 1 copy of your open house protocol outside the residence
- Post 1 copy of your open house protocol at your PPE station

During the open house:

- Greet visitors within 5 seconds or 5 steps of them walking into the home
- Ask each visitor to sign the guest register. If you have a drawing, ask them to enter that as well.
- Tour the home with guests and use your rapport building skills to create connections
- Use the appropriate script (buyer, seller, or neighbor) to ask for an appointment or referral
- Sanitize surfaces between guests
- Enforce no touching rules by offering to open cabinets and storage spaces for guests
- Manage the flow of traffic and ask guests to queue outside if necessary to be maintain compliance with local social distancing requirements
- If traffic slows:
 - Call your sphere and invite them to stop by
 - Rethink your sign strategy and have your partner move signs

After the open house:

- Clean up and sanitize all surfaces that may have been touched
- Turn off all lights and lock all doors
- Collect all of your signs
- Enter all contact information you gathered into Command
- Call all visitors to thank them for stopping by
- Implement a SmartPlan to immediately contact all names you gathered that were not converted to appointments
- Provide feedback to the listing agent. Include the number of guests and their reactions

Master Virtual Open Houses

Take clients on an interactive tour of a property in real time leveraging social media and your smartphone!

BEFORE the Open House

1. Create a strong title for your virtual open house.
2. Create the event on your social media.
3. Plan the path of the tour ahead of time and have the home's information available for reference.
4. Create promotional materials using Designs in Command to inform when the virtual open house will occur. ⓘ
5. Promote the event using Command.
 - 5.1 Social posts ⓘ
 - 5.2 Paid ads ⓘ
 - 5.3 Email ⓘ
6. When promoting the event, link to your KW App/KW App download page so people can explore more.
7. Perform a test of the connection and your equipment before going live.
8. Practice by creating a quick video inviting people to view your virtual open house.
9. Make a plan for how you want to introduce yourself to kick off the video.
10. Plan how you will address questions and comments.
11. Consider the time of day you are hosting the virtual open house and how that might affect the tour.

DURING the Open House

1. Think about your pacing; don't walk or talk too fast.
2. Interact with your audience and provide time to respond to comments and/or questions.
3. Highlight key features of the home. If you are hosting a one-on-one virtual tour, focus on the parts of the property that matter most to your buyer.
4. Keep the visual aspects of the home the focus of the video.
5. Be sure to close the video and say thank you.
6. Remind your audience how they can contact you if they have any questions.
7. Give people time to join the virtual open house. At the beginning, provide relevant data on the neighborhood market data surrounding the open house, or provide updates on mortgage rates.
8. Turn off additional notifications on your device during the virtual open house

AFTER the Open House

1. Follow up after the virtual open house.
2. Post the recording of the live video so viewers who missed it can watch.
3. Review any analytics and leverage them for the next live video.
4. Invite consumers who did not see the virtual open house to tune in to the posted video.
5. Follow up and stay in touch. Leverage these tools in Command:
 - 5.1 SmartPlans ⓘ
 - 5.2 Your KW App or Agent Site ⓘ
 - 5.3 Campaigns (Social posts, paid ads, emails, etc.) ⓘ

Facebook Live for Your Virtual Open House

Instructions: How to use Facebook Live

Practical directions from our collaboration with Facebook to make going virtual simple.

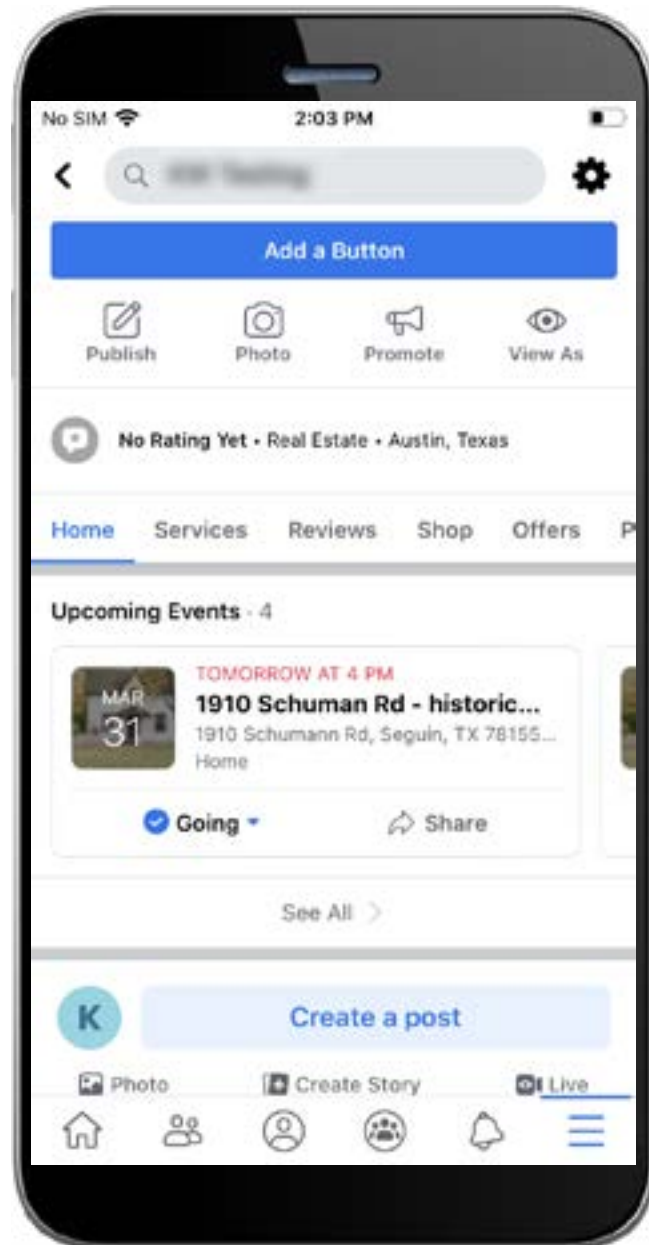
How to Create an Event From Your Facebook Page

To ensure people show up, think about the strategies you use to generate awareness for your actual open houses. The same strategies can extend to your virtual open house. People need to know when and where:

1. Go to your Facebook Business Profile Page (or personal page).
2. Tap to “Create” a post and choose “Event” from the list.
3. Add an event photo, perhaps the front of the house, then enter your event’s title, location, date, and time.
4. Save the event, then post a link to your listing and send to your clients!

How to Go Live From Your Facebook Page

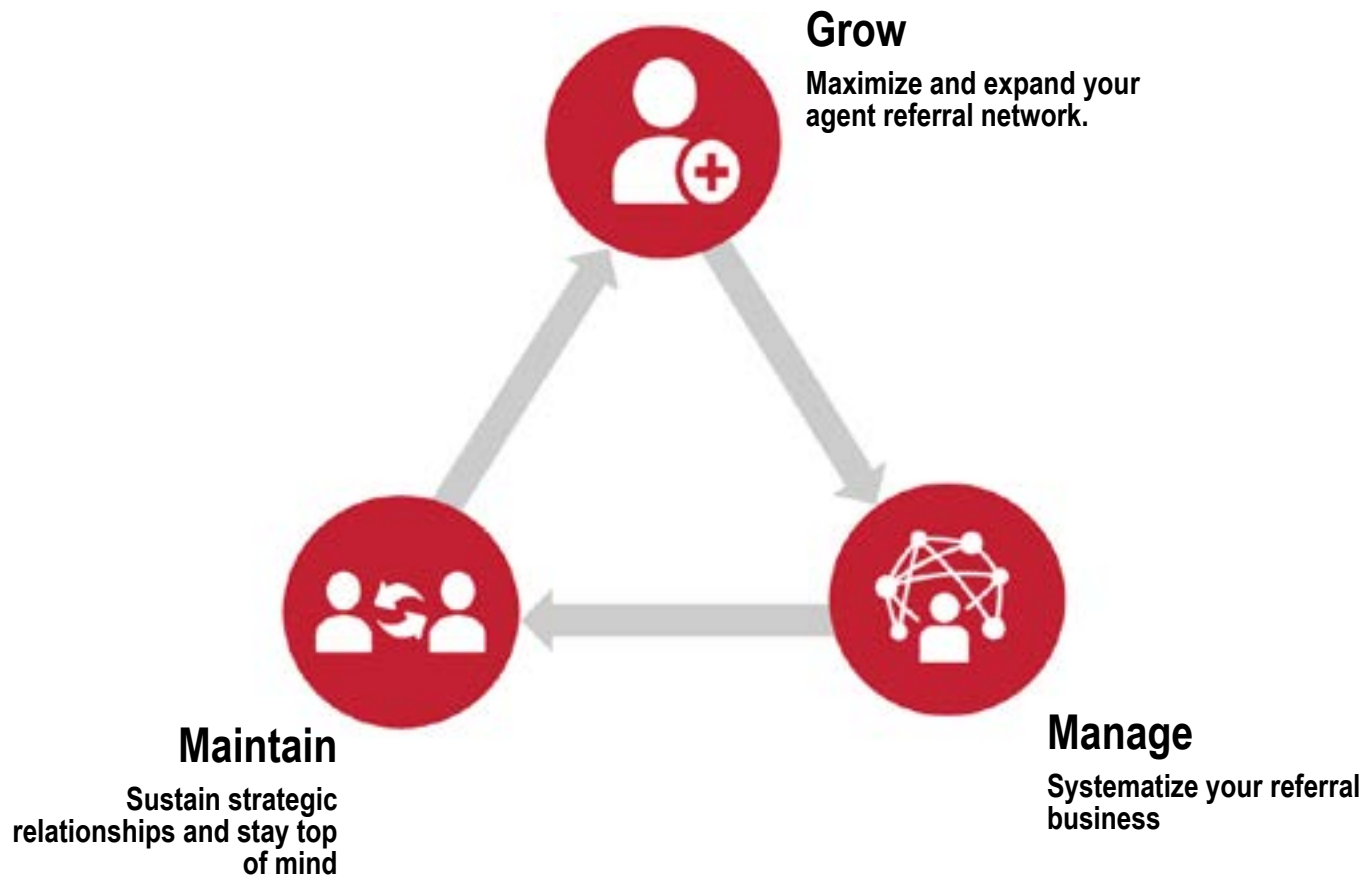
1. Go to your Business Profile Page (or your personal page).
2. Tap “Create Post” and choose “Live” from the list.
3. Make sure the app has access to your camera and microphone.
4. Set permissions to “Public.”
5. Add a description to the video - highlight the house information.
6. Tap “Start Live Video” to begin your virtual open house!



Useful Links



Grow Through Agent Referrals



Grow: Maximize and expand your agent network

1. Complete your Connect Profile **i**
2. Identify migration patterns **i**
 - Cities people are moving from
 - Cities people are moving to
3. Add agents you have met to your agent referral network **i**
4. Add agents you have not met and want to business with to your agent referral network **i**

Manage: Systematize your referral business

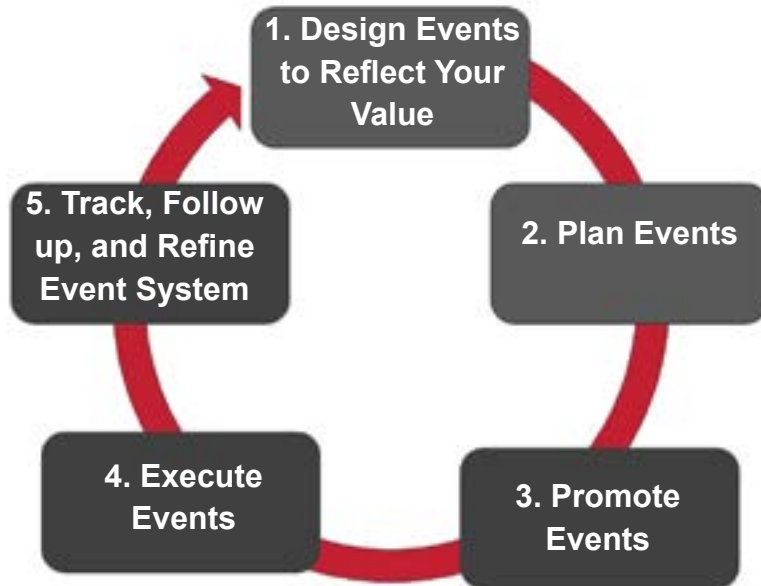
1. Build relationships with your network by adding them to customized touch campaigns
2. Receive and manage your referrals using the KW Referral Network **i**

Maintain: Sustain strategic relationships and stay top of mind

1. Implement your touch campaigns
2. Update your database with any information your receive

Plan Engaging Virtual Events

Get creative, have fun, offer value, and provide memorable experiences with virtual events. Get purposeful to build a big business with Virtual Events by following this simple 5-step process.



1. Design Events to Reflect Your Value: Identify what you love to do, what you do best, and what your brand represents. Choose one event type to begin.



Educational Events



Appreciation Events



Fun, Community, Networking Events

1. Educational Events	2. Appreciation Events	3. Fun, Community, Networking Events
<ul style="list-style-type: none"> • Seller • First Time Home Buyer • Refinance • Investing • Senior/Retirement 	<ul style="list-style-type: none"> • Sphere • Core Advocates • New Clients • Allied Resources • Referring Partners 	<ul style="list-style-type: none"> • Neighborhood Events • Charities/Drives • Contests / Games • Kids • Happy Hours / Book Clubs

Plan Engaging Virtual Events

2. Plan Events: Put together an annual plan for your events.

Decisions	Options	Helpful Tips
<input type="checkbox"/> Goal, Value/ Experience	<ul style="list-style-type: none"> Prospecting/Marketing, reward advocates, deepen relationships 	<ul style="list-style-type: none"> Think “give to get” and “give back” How will you affect lives?
<input type="checkbox"/> Budget	<ul style="list-style-type: none"> Prizes, Gift Cards, Raffle Items, Facebook Ads 	<ul style="list-style-type: none"> Set aside a portion of every commission Involve local small business as sponsors
<input type="checkbox"/> Hosting Platform	<ul style="list-style-type: none"> Zoom, Meet, Facebook Live, Instagram Live, LinkedIn Live, YouTube Livestream 	<ul style="list-style-type: none"> Familiarize yourself with the platform Set up your lighting, background, and microphone for best impression
<input type="checkbox"/> Who to Invite	<ul style="list-style-type: none"> A+ clients, neighborhood, general public, past clients, etc. 	<ul style="list-style-type: none"> Not everyone in you database matters equally Smaller groups are easier to connect with
<input type="checkbox"/> Co-host, Expert, Guest	<ul style="list-style-type: none"> Mortgage lender, Appraiser, Builder, Stager, etc. 	<ul style="list-style-type: none"> Include them in your marketing
<input type="checkbox"/> Sponsors	<ul style="list-style-type: none"> Local business owners, allied resources 	<ul style="list-style-type: none"> Cross promote with your business to business (B2B) partners
<input type="checkbox"/> Calendar	<ul style="list-style-type: none"> Weekly, monthly, annually 	<ul style="list-style-type: none"> Plan entire year Begin planning each event 6 weeks prior Schedule to send invitations and reminders
<input type="checkbox"/> Materials	<ul style="list-style-type: none"> Seminars, Online Games, Gifts and Raffle Items 	<ul style="list-style-type: none"> Look on KWConnect for First Time Home Buyer and Investor materials Partner with B2B for gifts and raffle items
<input type="checkbox"/> Registration	<ul style="list-style-type: none"> Phone, Email, Text, etc. 	<ul style="list-style-type: none"> Use Eventbrite or other event tools

Plan Engaging Virtual Events

3. Promote Events:

1. Create a strong title for your virtual event.
2. Promote your event via:
 - Website
 - Social Media
 - Eventbrite ®
 - Neighborhood newsletters
 - Postcards
 - Email
 - Phone
3. Send out personal invitations at least 3 weeks in advance.
 - Mention the value for attendees
4. Send reminders with a link to your platform 24 hours in advance.
5. Text an additional reminder the day of the event.

4. Execute Events: Be yourself, have fun, and promote your brand with clothing or a branded background.

1. Practice with the technology and have a tech partner handy in case of any problems.
2. Create a technology cheat sheet for your guests to avoid questions during the event.
3. Tell participants what they need to bring and offer downloadable resources.
4. Engage with questions, and ask attendees to turn on cameras, unmute to talk, and use chat.

5. Track, Follow-up and Refine Events: Improve every time and get results!

Track	Follow-up	Refine and Repeat
<input type="checkbox"/> Track attendance and conversion	<ul style="list-style-type: none">• Call all no-shows and send thank you notes• Ask for feedback	<ul style="list-style-type: none">• Update your plan• Do it again and again!