

Keller Williams University



# *Grow Your Profit Share Tree*

Stacia Thompson

**THEY SAY THAT MONEY DOESN'T GROW ON TREES ...  
IT DOES ON THIS ONE**





## Table of Contents

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Welcome to “Grow Your Profit Share Tree” .....	1
Why Profit Share? .....	2
How Does It Work?.....	4
Want to Opt-In to Opportunity and Help Grow the Company?.....	12
How Much Do You Want?.....	21
You’re Ready to Grow Your Profit Share Tree! .....	23

## Acknowledgments

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The author would first like to thank Gary Keller for his powerful vision for a company in which associates are treated like stakeholders.

This course began as an energetic initiative from Mark Willis, Mary Tennant, Bryon Ellington, Jay Papasan, and Alexis MacIntyre to empower Keller Williams associates to take advantage of the passive income opportunity that Keller Williams Realty created.

A very heartfelt thanks is extended to Gene Frederick, Regional Director at Virginia and West Virginia, and Madison Offenhauser, Regional Director at California-Southern and California-LA Coastal. These compelling teachers drove the direction and creation of this content. Their passion for Keller Williams Realty and the opportunity afforded associates through Profit Sharing is inspiring. Their commitment to launching the pilot program for this course enabled it to happen, and for this the author is deeply grateful.

## Notices

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## Notes

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# Welcome to “Grow Your Profit Share Tree”



Welcome to the **Grow Your Profit Share Tree** course!

By the end of this course, you will be empowered to achieve the following two Big Goals:

**1**

**Know how to enjoy the privilege of being treated like a stakeholder.**

**2**

**Have a plan to activate your passive income potential.**

This course is designed so that you can walk away from it with a plan in place for a prosperous Profit Share Tree. If you like, you can take this course again and again to refresh and refine your skills until you achieve its two Big Goals.



# Why Profit Share?



At Keller Williams Realty, we are growing a Profit Share Tree because we solidly believe our associates should be treated like *stakeholders*. Profit Sharing is exactly what it sounds like. We share almost 50 percent of every Market Center's owner profit with the associates who help grow the company. We do it because that's how you treat *stakeholders*.



**This belief is foundational to who we are. We truly believe that together everyone achieves more.**

When a Market Center has a profitable month, those profits are split between the owners who took the risk of investing in the Market Center and the *associates who helped the Market Center grow*.

Profit Sharing means that any associate can become part of the growth trajectory for any Keller Williams Market Center, and can be rewarded with **passive, potentially long-term income** without investing any capital. You can be a part of your company's success and you are rewarded with a portion of the profits.

When Gary Keller and the first Associate Leadership Council (ALC) created the Profit Share system, they were purposely making a bold statement. Gary explains, "We created a program that would treat our real estate sales associates like legitimate partners in the business. We created a program that allows associates to build a business inside a real estate company that is *as powerful as if they owned the company themselves*."



## Watch

Watch a KWConnect video on wealth building.  
[www.kwconnect.com/wealthbuilding](http://www.kwconnect.com/wealthbuilding)



# Completely, Entirely, Wholly, Absolutely Passive Income

The income you can receive from Profit Share—your reward for helping the company grow—is an absolutely passive opportunity. You share in the profits of the company like an owner would, but without *any personal risks or investing any capital*.

- No financial risk
- No legal risk
- No down payment
- No phone calls

## What is passive income?

Money that you receive without doing

\_\_\_\_\_

to earn it.

Madison Offenhauser, Regional Director at California-Southern and California-LA Coastal, has received more than \$60,000 in Profit Share. He also receives passive income from a couple of rental properties he owns. He points out the return from the rental properties hasn't been as high as the Profit Share. "And my Profit Share is much more *passive*," he states. "My Profit Share didn't require 20 percent down, and it has never called me in the middle of the night because the toilets were clogged," he says with a laugh.



# How Does It Work?



Let's step back to see the forest—The Big Picture of Keller Williams Profit Share. We'll review how it's calculated in a moment.

## The Big Picture

1. An associate joins *any* Market Center in Keller Williams Realty and names *you* as her sponsor.
2. In a particular month, as part of her split, she pays Company Dollar to her Market Center.
3. During that month, her Market Center is profitable.
4. On the 21<sup>st</sup> of the following month, Profit Share is automatically deposited to your account.



*Special Note: You are not getting a portion of the associate's commission. You are sharing in the **owner's profits**.*

5. When you've been a Keller Williams associate for three years and a day, you are *vested*. When you are vested, you could leave Keller Williams Realty and still receive Profit Share.
6. You can will your Profit Share to a beneficiary.

## Questions?

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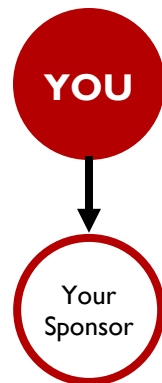
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# How the Tree Grows

When you joined Keller Williams Realty, you thought of *one person* who was primarily responsible for bringing you to the company. It may not have been the first or the last person you talked to. It *was* the person who was most impactful on your decision-making process.



That person was your sponsor.

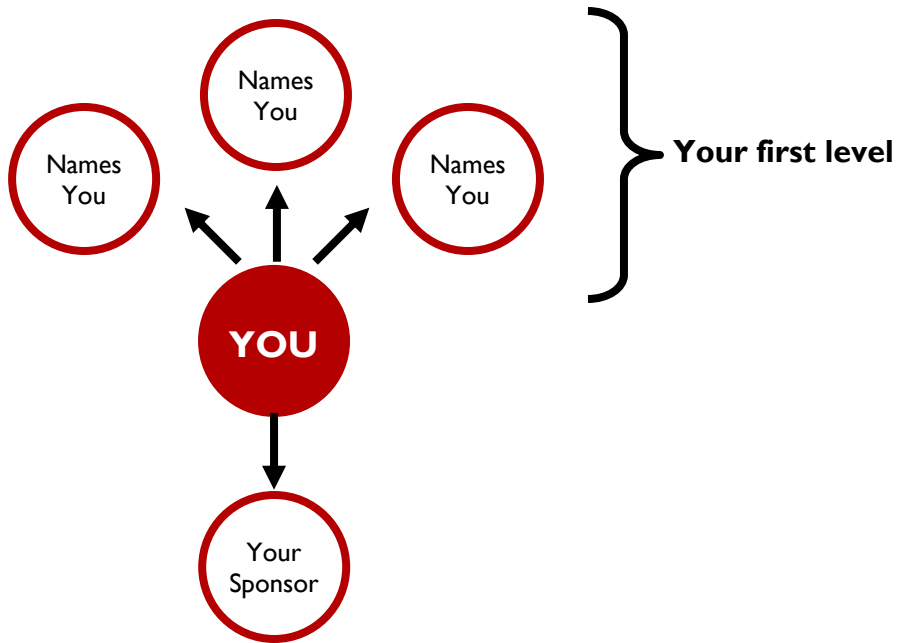


Your sponsor was asked to name the one person responsible for their joining Keller Williams Realty.

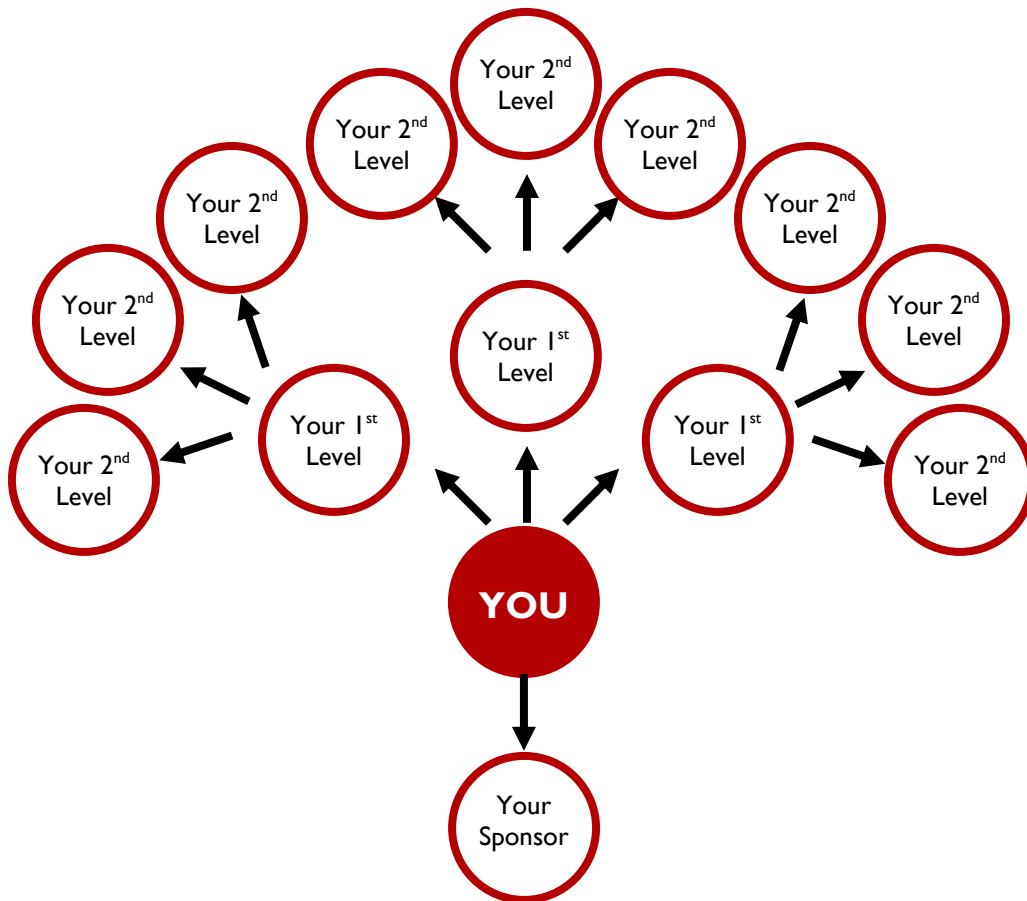


As with a family tree, we can trace sponsors in the Profit Share Tree back many levels. Currently, the Profit Share system goes back *seven* levels.

When someone names you as their sponsor, they go into your “first level.”



If someone names one of those people as a sponsor, they go into your “second level.” Currently, the Profit Share system grows *seven* levels.



## Focus on the First Level

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People who name you as their sponsor are in your first level. Though there are seven levels to the Profit Share Tree, you need only focus on developing the first level.

Though, if you wanted to get purposeful about it, you could certainly encourage people in your first level to develop *their* first level.

*Time* is the nourishment that grows the other levels. As people in your first level develop relationships and grow their Profit Share Trees, your tree grows. The same holds true for your second level, third level, and so on.



Althea Osborn has received more than \$2,700,000 in Profit Share.

She has a total of **5,488** associates in her tree.

Only **fourteen** named her as a sponsor, though. Those are the people in her “first level.”



### Is It Too Late?

Absolutely not! Your opportunity is now.

Now is a phenomenal time to “opt-in” to opportunity!

As the Chinese proverb states, “The best time to plant a tree was twenty years ago. The second best time is *now*.”

# Four Steps to Profit Share

## Is Profit Share Real Money?

**Yes, it is.**

In 2008, Keller Williams Realty Market Centers distributed to their associates **more than \$30 million** in Profit Share.

From the beginning of the Profit Share system through the end of 2008, Keller Williams Realty Market Centers gave their associates approximately **\$237.7 million** in Profit Share.

Every month Market Centers split their profits, with *roughly 52 percent going to the owners who took the risk, and 48 percent going to the associates who helped the company grow*. Madison Offenhauser, Regional Director at California-LA Coastal and California-Westside LA, points out this is a very big deal. “Do you know any other real estate company that splits nearly half of its profits with its associates?” he asks. “Without any risk, associates can participate in this company as if they were owners.”

## Take a Closer Look

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Let's take a closer look at how Profit Share is calculated. Understand it so you can understand your role as a stakeholder. Don't worry, though. You will never have to explain the math.

There are four steps to Profit Share:

- **Step 1: The Market Center Calculates Profit**
- **Step 2: The Market Center Splits the Profit**
- **Step 3: The Profit Share Factor Is Calculated**
- **Step 4: The Profit Share Is Dispersed**

**I**

**On a monthly basis, the Market Center calculates profit.**

### Step 1: The Market Center Calculates Profit

Market Center Gross Closed Commission		\$1,070,124
Less Keller Williams Realty Royalty Fee	-	\$27,416
Equals Net Gross Commission	=	\$1,042,708
Less Associate Commission	-	\$910,671
Equals Company Dollar	=	\$132,037
Less KW Approved Expenses	-	\$58,378
Equals KW Profit (or Loss)	=	\$73,659

*Note: If there is no profit, there will be no Profit Share to distribute.*

**2**

**The Market Center splits the profit between the Profit Share pool and the owners.**

### Step 2: The Market Center Splits the Profit

	<u>Profit Share Pool</u>		<u>Owner Profit</u>	
<b>Level 1</b>				
First \$2,990 of profit	25%	\$747.50	75%	\$2,242.50
<b>Level 2</b>				
Next \$8,250 of profit	35%	\$2,887.50	65%	\$5,362.50
<b>Level 3</b>				
Any profit over \$11,240 (\$2,990 + \$8,250 = \$11,240)	50%	\$31,209.50	50%	\$31,209.50
<b>Totals</b>		<b>\$34,844.50</b>		<b>\$38,814.50</b>

Or think of it this way: *roughly* **52 percent** of profit goes to the owners who took the risk, and **48 percent** goes to the associates who helped the company grow.

**3**

**The Profit Share Factor is calculated for each Market Center.**

### Step 3: The Profit Share Factor Is Calculated

On a monthly basis, the Market Center's Profit Share Factor is determined by dividing the Market Center's total Profit Share Pool by its Company Dollar amount.

In our example, if we divide the Market Center's \$34,844.50 Profit Share Pool by its \$132,037 Company Dollar, we find a Profit Share Factor of .2639.

## Step 4: The Profit Share Is Dispersed

What each associate paid in Company Dollar for a month is multiplied by the Profit Share Factor to find the amount of Profit Share that will be distributed to that associate's branch in the Profit Share Tree on the 21<sup>st</sup> of the following month.

In our example, if an associate paid \$1,800 in Company Dollar that month, we multiply that \$1,800 by .2639 to find that \$475.02 will be distributed to this associate's branch.

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**The Profit Share is dispersed through the branches of the Profit Share Tree.**

## How the Money Grows on This Tree

Remember how the tree grows? If someone names you as their sponsor, they are in your first level. If someone names that person as their sponsor, the new person is in your second level.

And so on for seven levels.

The disbursement of profit through an associate's branch is on a tiered system. The first ALC determined these percentages. Subsequent International ALCs have considered changing them, but have ultimately agreed these numbers work best.



In the example above, if our associate is in your first level, as sponsor, you would get \$237.51 deposited into your account on the 21<sup>st</sup> of the month following these calculations. If our example associate is in your sixth level, you would get \$47.50 deposited.

### Profit Share Distribution

From Your 7 <sup>th</sup> Level	12.5%	x 475.02 =	\$59.38
From Your 6 <sup>th</sup> Level	10%	x 475.02 =	\$47.50
From Your 5 <sup>th</sup> Level	7.5%	x 475.02 =	\$35.63
From Your 4 <sup>th</sup> Level	5%	x 475.02 =	\$23.75
From Your 3 <sup>rd</sup> Level	5%	x 475.02 =	\$23.75
From Your 2 <sup>nd</sup> Level	10%	x 475.02 =	\$47.50
From Your 1 <sup>st</sup> Level	50%	x 475.02 =	\$237.51
<b>Total</b>	<b>100%</b>		<b>\$475.02</b>

Example distribution for our example associate and Market Center.



## Could Profit Share Be Real Money to Me?

**Yes, it could.**

Remember *time* nourishes the tree. As your levels develop, your Profit Share can grow.

Perhaps, at first, you only have one person on your first level.

Maybe you receive \$22.

That could be a free lunch with a friend.

Over time, it can grow.

Perhaps later you have two people on your first level and three on your second. Maybe you receive \$500.

Perhaps that would cover your car payment.

After more time, your Profit Share Tree could continue to grow.

Maybe your Profit Sharing check grows to \$4,000.

That could be a nice vacation with your family.

Perhaps after more time, you're receiving \$22,000 a year.

Perhaps you start saving it and use it later to pay your daughter's tuition ... wherever she wants to go to school.

## What could Profit Share do for you and your family?

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## What could you do for someone in need?

Profit Share is a gift—a gift that can make fresh, fulfilling opportunities possible in your life and in the lives of your loved ones. As you consider receiving the gift of Profit Share, you may want to consider giving a gift—a gift to KW Cares through automatic deductions on your Greensheets. KW Cares is a 501(c)(3) public charity that provides emergency financial assistance to KW family members who experience financial hardship due to sudden emergencies. Your gift need not be great to have a great impact. Talk with your Market Center Administrator (MCA) to set up a deduction for a donation from each of your transactions. Together, we can achieve more—and do more—for our KW family. See your MCA or [www.kwcares.org](http://www.kwcares.org) for more information.

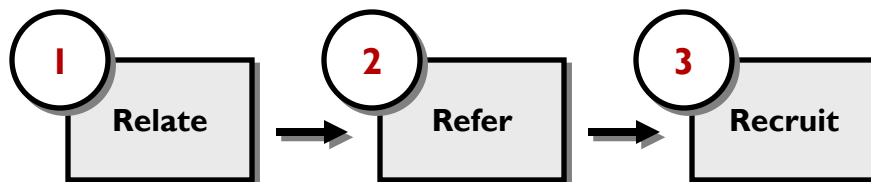
# Want to Opt-In to Opportunity and Help Grow the Company?



Just build a relationship and refer. That's it. You're not a recruiter. That's the Team Leader's job. **Your job is to inspire interest.**

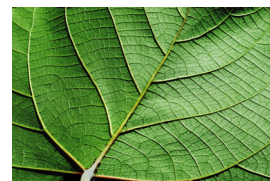
Our company grows when we succeed through each other. As a result of your relationships and referrals, your Market Center will grow. As a result of your Team Leader's recruiting efforts, your Profit Share Tree can grow.

We can think of this path to growth in the following three steps:



- In **Step 1**, you relate, or in other words, you build a relationship.
- In **Step 2**, you give your Team Leader (or any Team Leader in the Keller Williams system) a referral.
- In **Step 3**, your Team Leader (or any Team Leader in the Keller Williams system) recruits someone who may name you as their sponsor.

If you want to become the *one person* who is responsible for bringing someone to the company, just develop a relationship with them. Tell them why you love it at Keller Williams Realty. Then refer them to your Team Leader.



This is how our company grows. Real estate is a relationship business. Market Center growth is just another aspect of that relationship business. And it can be a particularly profitable aspect!

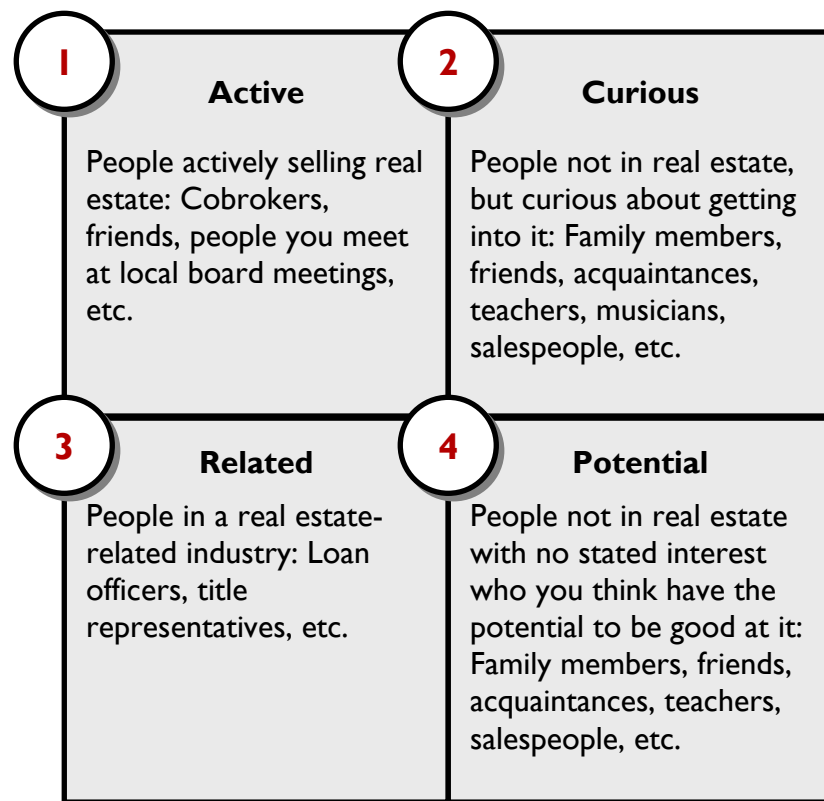
# Step 1: Relate

Building a relationship can be broken down into three components: 1) *who* to talk to, 2) *what* to say, and 3) *how* to follow up.

## 1) Who

You never know who is ready for change. Your purposeful comment or connection could be the catalyst for positive transformation in someone's life in terms of which company they're with—or even which career they're in. Nearly *anyone* could be a potential member of your Profit Share Tree. And nearly *everyone* would benefit from the value and opportunity Keller Williams Realty brings.

Potential members of your Profit Share Tree fall into one of four quadrants.



Connect with people in each of the squares to cover all of your bases. You never know who is ready to respond to the value and opportunity of Keller Williams Realty. And when they are ready, you want to be the *one person* who comes to mind as their inspiration.

Gene Frederick, Regional Director at Virginia and West Virginia, recommends that after a transaction, whether it was two months ago or a day ago, you call the other agent in the deal. Co-op agents, he points out, are a wonderful place to start building relationships.



“You’re not selling anybody on anything. You’re not making any sort of presentation,” he explains. “You’re talking to people, and you’re getting to know them. You’re simply saying that you’re pretty happy where you are.”

“Your goal,” he continues, “is not to get someone to sign up with Keller Williams. Your goal is to refer them to your Team Leader. You can do this! It *is* easy!”

## Real-Play: Where Will You Find People?

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1. Who could you purposefully start building a relationship with today?

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2. Where could you find other people to talk to?

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**Time:** 5 minutes

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## 2) What

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It's remarkably simple to inspire interest by being natural, honest, and yourself. You can however, "thwart" the process by inadvertently putting someone on the defensive.

Keep the "thwart" away by adhering to the following rules:

1. Never say anything negative about someone else's company.
2. Never say anything negative about someone else's broker.
3. Never say anything negative about what you think they might be experiencing.

Never say anything like the following:

- "Why do you even work there?"
- "Don't you get it?"
- "Why would you pay your company so much money?"

You can, however, achieve success with the following process:

1. Invite an agent to coffee.
2. Ask relationship-building questions.
3. Share Gary Keller's latest career-powering book, *SHIFT*.
4. Suggest a meeting with your Team Leader.

### I. Invite an Agent to Coffee Script

Gene Frederick, Regional Director at Virginia and West Virginia, recommends the following script to meet with a co-op agent after a transaction has closed.



Hi (Agent Name), this is (Your Name).

It was so much fun doing that transaction with you. I really liked the way you handled ...

(Agent Name), can we go meet for coffee next Tuesday? I just want to get to know you. And I have a small gift of appreciation I'd like to give you. Is that OK? How about Tuesday at 10:00 a.m.?

If you've never done a deal with the agent, you could use the following alternate script.



Hi (Agent Name), this is (Your Name).

It was so much fun (talking with you at that seminar).

(Agent Name), can we go meet for coffee next Tuesday? I'd just like to get to know you and talk shop. Is that OK? How about Tuesday at 10:00 a.m.?

## 2. Ask Relationship Building Questions

While you meet with the agent, get to know them, talk shop, and remember to stay positive!



Tell me a little bit about yourself. (Ask questions using FORD: Family, Occupation, Recreation, and Dreams.)

How long have you been in the business?

How do you like it at ... ?

When you get the return question, "How do you like it at Keller Williams," be honest. Don't compare Keller Williams to anybody else's company. Simply speak to *your experience*.



I love Keller Williams. The energy in our Market Center is phenomenal right now.

I went to a Seller Mastery class this week and actually increased my business while I was in class. It was a powerful experience.

I love working with my Team Leader. He always puts my business first.



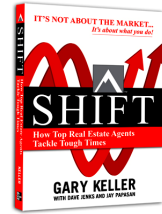
Don't gush, just be genuine, be yourself.

And remember that you have absolutely nothing to lose.

If they never join Keller Williams Realty, you've got a great new colleague in the industry. If they do join Keller Williams Realty, you've got a great new colleague in the company.

### 3. Give the Gift of *SHIFT* Script

What better gift of appreciation than the twelve proven strategies for achieving success in any market? Give the gift of *SHIFT* and invite the agent to continue building the relationship.



You will love this book.

It will open your eyes to another way of doing business. And quite frankly, it's packed with great ideas that will get you more leads.

If you've built rapport, you've probably identified specific ways this book could help your colleague's business. Alternately, you can speak to how it made an impact on you.



Let me know what you think of page 71.

I completely changed how I was doing open houses after that section.

You're giving a gift of substance—a gift that has transformed businesses and lives. It could be a powerful catalyst for change in the hands of your colleague.

### 4. Suggest a Meeting with Your Team Leader Script

Suggesting a meeting with your Team Leader (or any Team Leader in the Keller Williams Realty system) can be a natural development in the relationship-building conversation.

Betsy Scheffe, top agent from Austin, Texas, has had 18 people name her as a sponsor and has received more than \$675,000 in Profit Share. She likes the script, "My Team Leader is just the best there is. I would love for you to meet him."

When Mary Tennant, president and COO of Keller Williams Realty International, was a Team Leader, one of the associates in her office loved his consulting appointments with her. He would say to potential members of his Profit Share Tree, "If I can get you a consulting appointment with Mary, don't blow it!"

Your suggestion can be short and to the point.



My Team Leader could tell you more about that.

I'll have her follow up with you.

## Role-Play: What Will You Say?

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1. Break into pairs.
2. Take turns walking through the following scripts:
  1. Invite an agent to coffee.
  2. Ask relationship-building questions.
  3. Share Gary Keller's latest career-powering book, *SHIFT*.
  4. Suggest a meeting with your Team Leader.

And remember, you're not recruiting. You're building a relationship.

3. Jot down your challenges and aha's.

### Challenges:

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### Aha's:

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4. Share your challenges and aha's with your instructor and the class.

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**Time:** 25 minutes



### 3) How

Once you initiate a purposeful relationship, you must follow up if you want the relationship to develop.

1. If you have a Facebook page, add your colleague as a friend.
2. If you have a LinkedIn profile, connect to your colleague.
3. Call your colleague to find out what they thought of *SHIFT*.
4. After alerting your Team Leader, invite your colleague to a training class in the Market Center, to a Sales Meeting, to a Market Center social event, or to a Regional Event.
5. Use your business contact management system, i.e., Top Producer, to track when you contacted your referral, what you talked about, and when you will follow up!

Once you have initiated a relationship, you are ready for Step 2: Refer. You can continue your follow-up procedure, while your Team Leader is initiating the recruiting process.

## Step 2: Refer

After meeting with an agent and sharing *SHIFT*, complete the agent referral information form and submit it to your Team Leader or to any Team Leader in the Keller Williams Realty system. This form can be found on the Keller Williams Intranet. Remember, your objective is to build a relationship. The Team Leader's objective will be to recruit.

**You Build the Relationship**

Team Leaders Recruit.

To find this form on the KW Intranet:

1. Log on to [intranet.kw.com](http://intranet.kw.com).
2. Click on the **Resources** tab.
3. Click on **New Agent**.
4. Click on **Page 3** of the Referral Forms.

The image shows a sample of the Keller Williams Realty Agent Referral Information Form. The form is titled "Keller Williams Realty Agent Referral Information Form" and includes fields for "Referral Name", "Referral Address", "Referral Phone", "Referral Email", "Referral Title", "Referral Date", "Referral Status", "Referral Source", "Referral Reason", "Referral Date", "Referral Status", "Referral Source", "Referral Reason", "Referral Date", "Referral Status", "Referral Source", "Referral Reason". There are also sections for "TEAM LEADER ASSIGNMENT" and "PRIORITY".

## **Step 3: Recruit**

Your Team Leader (or any Team Leader in the Keller Williams Realty system) will take over in Step 3: Recruit. In this step, Team Leaders get to do what they do best! They'll introduce each recruit to the specific opportunities and benefits in Keller Williams that will launch that particular recruit's business to the next level of production, profits, or efficiency.

Remember, you are only making a referral. Attempting to actually recruit someone yourself may actually slow down the process.

## **Unlimit Your Thinking**

Everybody has limiting beliefs at some point. Right now you might be thinking about someone who would be a great addition to your Market Center, but perhaps you think they'll never make a change. Or perhaps the co-op agent in your last deal was a Mega and you think they won't have time to go to coffee with you.

When you limit your thinking, you draw a circle around what can happen. When you unlimit your thinking, the possibilities take off!

### **What is a limiting belief of yours?**

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### **Now, unlimit your thinking!**

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# How Much Do You Want?



**Profit Share is an equal opportunity, unequal outcome program.**

What could you do if you had ten associates in your first level? How about twenty?  
What would it do for you and your family?



Remember what you said more profit could do for you?  
What could you do with **passive, long-term income**  
with no personal investment?

Would you enjoy checking your account and finding another automatic deposit from  
Profit Sharing?

**Are you ready to reap the rewards of a company that treats you like  
a partner?**

# Plan for a Prosperous Tree

## **Plant the Seed:**

How many people do you want in your first level?

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## **Cultivate Your Tree:**

How will you achieve this?

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## **Collect Profit Share:**

When will you achieve it?

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What does that mean for this month?

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What does that mean for today?

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# You're Ready to Grow Your Profit Share Tree!



In this course you learned how to take advantage of a tremendous passive income opportunity. You've now achieved the following two Big Goals:

**1**

**Know how to enjoy the privilege of being treated like a stakeholder.**

**2**

**Have a plan to activate your passive income potential.**

**Amplify your life now by getting started now.** Remember your goal?  
Let's start achieving it!

Use the scripts at the end of this guide and call someone you identified earlier. Remember, you're not recruiting; you're just inspiring interest. Complete the referral form on the following page to refer a potential recruit to your Team Leader.

**Keller Williams Realty  
Associate Referral Information Form**

*Thanks for helping to build your future and the future of our Market Center*

TO: Team Leader:	FROM: Agent:
Date Contacted:	Date of First Appointment:
Please Contact:	
Name of Firm:	
Address:	
City/State/Zip:	
Business Phone:	
Home Phone:	
Fax Phone:	

**ABOUT YOUR REFERRAL**

Years in Business:	People Skills:
Approximate Volume:	Technical Skills:
# of Transactions:	Task Orientation:
Specializes in (area):	Team Player:
<input type="checkbox"/> Lists or <input type="checkbox"/> Sells Mostly (check one)	Leadership Potential: <input type="checkbox"/> TL or <input type="checkbox"/> Other:
Needs Analysis: (getting career started fast, coaching, consulting, team play, more time, exit plans, investment opportunities in ownership, ALC, power, etc.) PLEASE EXPLAIN:	COMMENTS:

**TEAM LEADER REMARKS**

Date Contacted:	Date of Appointment:

**FOLLOW-UP**

Date:	Team Leader Comments:

## Notes

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# The Four Steps to Profit Share

Use this worksheet if you would like to work through the four steps to Profit Share on your own.

## Step 1: The Market Center Calculates Profit

Market Center Gross Closed Commission		_____
Less Keller Williams Realty Royalty Fee	-	_____
Equals Net Gross Commission	=	_____
Less Associate Commission	-	_____
Equals Company Dollar	=	_____
Less KW Approved Expenses	-	_____
Equals KW Profit (or Loss)	=	_____

## Step 2: The Market Center Splits the Profit

	Profit Share Pool	Owner Profit
<b>Level 1</b> First <b>\$2,990</b> of profit	25%	75%
<b>Level 2</b> Next <b>\$8,250</b> of profit	35%	65%
<b>Level 3</b> Any profit over <b>\$11, 240</b> (\$2,990 + \$8,250 = \$11,240)	50%	50%

**Totals**



### Step 3: The Profit Share Factor Is Calculated

On a monthly basis, the Market Center's Profit Share Factor is determined by dividing the Market Center's total Profit Share Pool by its Company Dollar amount.

If we divide the Market Center's \_\_\_\_\_ Profit Share Pool  
by its \_\_\_\_\_ Company Dollar, we find a Profit Share Factor  
of \_\_\_\_\_.

### Step 4: The Profit Share Is Dispersed

What each associate paid in Company Dollar for a month is multiplied by the Profit Share Factor to find the amount of Profit Share that will be distributed to that associate's branch in the Profit Share Tree.

How much did someone who named you as a sponsor pay in Company Dollar this month? (Guesstimate or play around with a hypothetical number.) \_\_\_\_\_

If you multiply that amount by the Profit Share Factor, you get the amount  
\_\_\_\_\_ distributed to this associate's Profit Share tree branch.

Multiply that amount by .50 and you'll find how much you would get:

\_\_\_\_\_

## Notes

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# Scripts

## Invite an Agent to Coffee Script

Use the following script for co-op agents.



Hi (Agent Name), this is (Your Name).

It was so much fun doing that transaction with you. I really liked the way you handled ...

(Agent Name), can we go meet for coffee next Tuesday? I just want to get to know you. And I have a small gift of appreciation I'd like to give you. Is that OK? How about Tuesday at 10:00 a.m.?

If you've never done a deal with the agent, you could use the following alternate script.



Hi (Agent Name), this is (Your Name).

It was so much fun (talking with you at that seminar).

(Agent Name), can we go meet for coffee next Tuesday? I'd just like to get to know you and talk shop. Is that OK? How about Tuesday at 10:00 a.m.?

## Relationship Building Questions

While you meet with the agent, get to know them, talk shop, and remember to stay positive!



Tell me a little bit about yourself. (Ask questions using FORD: Family, Occupation, Recreation, and Dreams.)

How long have you been in the business?

How do you like it at ... ?

When you get the return question, "How do you like it at Keller Williams," be honest. Don't compare Keller Williams to anybody else's company. Simply speak to *your experience*.



I love Keller Williams. The energy in our Market Center is phenomenal right now.

I went to a Seller Mastery class this week and actually increased my business while I was in class. It was a powerful experience.

I love working with my Team Leader. He always puts my business first.

## Give the Gift of *SHIFT* Script

What better gift of appreciation than the twelve proven strategies for achieving success in any market?



You will love this book.

It will open your eyes to another way of doing business. And quite frankly, it's packed with great ideas that will get you more leads.

If you've built rapport, you've probably identified specific ways this book could help your colleague's business. Alternately, you can speak to how it made an impact on you.



Let me know what you think of page 71.

I completely changed how I was doing open houses after that section.

## Suggest a Meeting with Your Team Leader Script

Your suggestion can be short and to the point.



My Team Leader could tell you more about that.

I'll have her follow up with you.

