KELLERWILLIAMS

AGENT

TEAMERAGE

Playbook

KW Where Entrepreneurs Thrive

Notices

Telemarketing

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- calculation of agent compensation;
- evaluation of a Market Center's financial results;
- agent productivity strategies; and
- estimates of return on investment.

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Welcome to the Teamerage Playbook

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

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

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

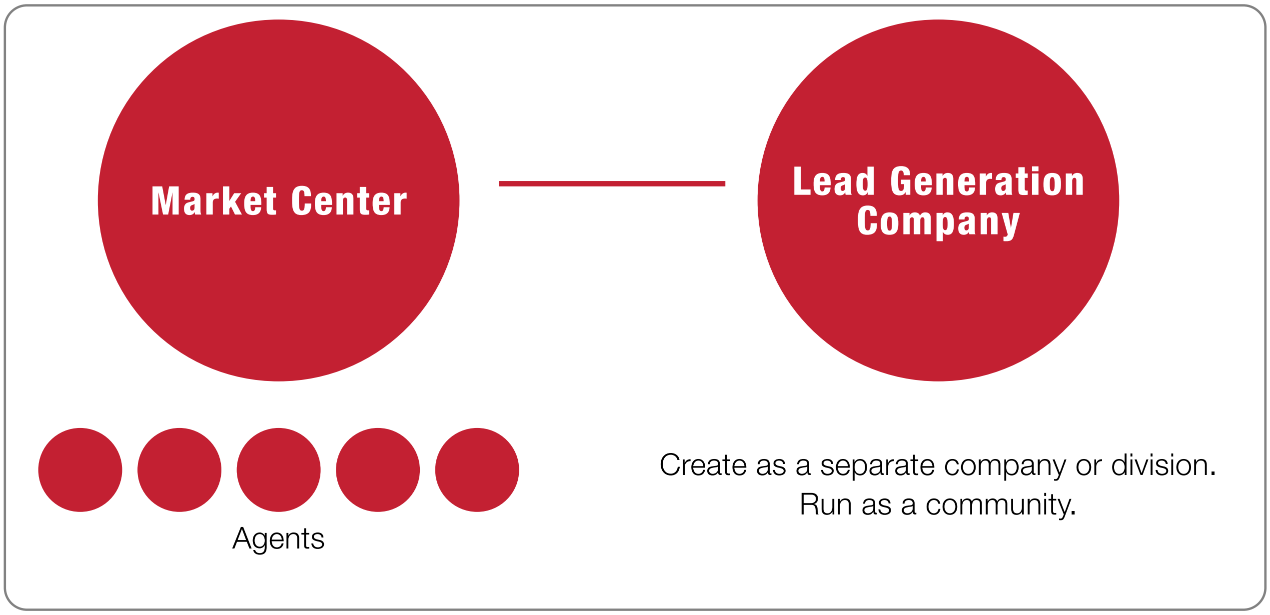
Today, more than anything else, real estate agents want easier access to consumers and are more than willing and happy to partner with their brokerages to receive leads and appointments. The most successful and profitable brokerages will be Market Centers that not only continue to provide the broker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

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

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

Step 1: Generate Leads

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



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

Let's say that a team owner has enough leads and systems to enable 1 agent on their team to close 2 transactions per month at an average of $12,000 in GCI. That would be a total of $24,000 GCI. At a 50/50 split, the Gross Team GCI would be $12,000 or $144,000 Gross per year. The average agent is on a team for about 3 years and over that time would generate $432,000 in Gross Team GCI. If that team was operating at a 30% profit margin each agent on the team would generate $129,600 NET profits to the team in a three-year time period.

Now, imagine if that team had 100 agents on it. That would mean they would multiply $129,600 X 100 agents = $12,960,000 NET Profit every three years!!! The challenge is that it is difficult to recruit that many agents and most teams never will.

HOW MANY AGENTS DO YOU HAVE IN YOUR MARKET CENTER?

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

Step 2: Create, Nurture, and Monetize Leads

Step 1 Create Leads through Additional Sources

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

Step 2 Hire to the Organization Chart

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

Step 3 Identify Agents, Train, and Hold Agents Accountable

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

Step 4 Qualify the Lead

1. All "Now" Business will be Sent to an Agent Immediately
2. All "Future" Business will be Sent for Short and Long Term Nurture

Step 5 Nurture Future Business

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

Step 6 Manage the Database

1. Run a Powerful 36 Touch Program

1. Create Leads

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

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

1.) Buy Leads

Bought leads can either be generated through your CRM or a third-party source like Google Ads. To generate new bought leads in Command, reference *Tech Play #20* - Run Social Media Ads (paid).

2.) Prospect and Market to Create Leads

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

Below is a list of prospecting and marketing tools:

Prospecting

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

Both

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

Marketing

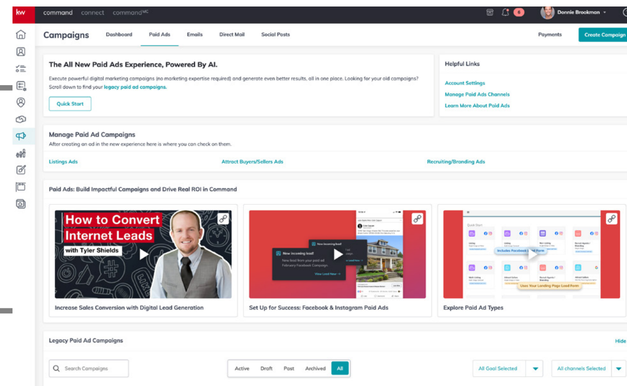
1. Advertising
    1. Pay Per Click
    2. SEO
    3. Radio
    4. TV
    5. Newspapers
    6. Personal Vehicles
    7. Bus Stop Benches
    8. Social Media
    9. Portals
    10. Magazines
    11. Billboards
    12. Yellow Pages
    13. Grocery Carts
    14. Moving Vans
2. Broadcast/Content Creation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

#20 RUN PAID SOCIAL MEDIA ADS

Agents can run paid ads through Command on Facebook, Instagram, and Google. Campaigns creates an easy button for agents to build a variety of ad types to both create awareness of their brand and generate new leads directly in their Contacts database. Lead settings allow the agent to tag and trigger SmartPlans to bring immediate follow-up automatically. Agents can choose listings to advertise and leverage AI to create ad copy easily.

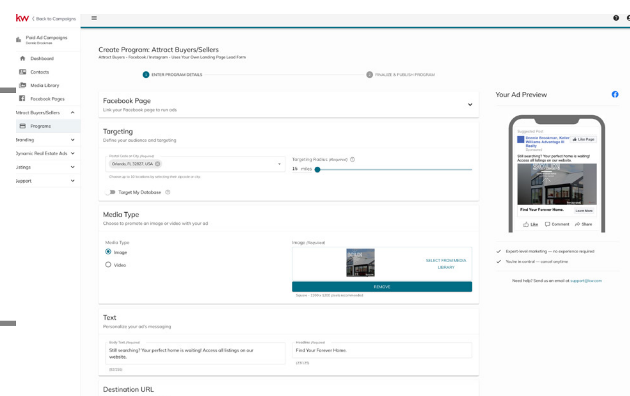
CREATE PAID AD

1. Navigate to Command > Campaigns
2. Select “Paid Ads” tab
3. Choose “Create Campaign” and select Paid Ad



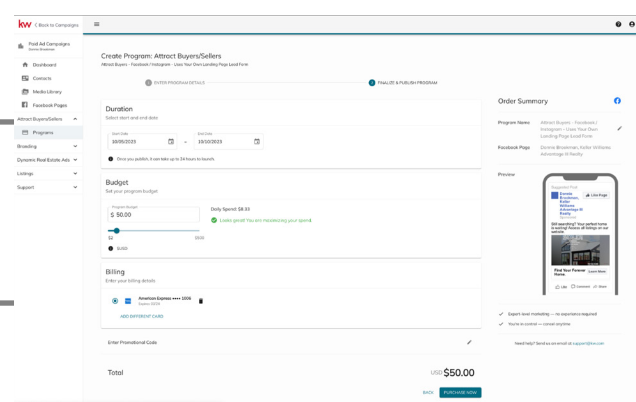
SELECT YOUR AD TYPE

1. Choose Ad Type
2. Select Listing (for listing ad types)
3. Customize targeting, media, and text (Option: Use AI to autogenerate text)
4. Proceed to the last step



LAUNCH YOUR AD

a. Review ad duration
b. Set ad budget
c. Confirm details and launch ad



#20 RUN PAID SOCIAL MEDIA ADS (CONT.)

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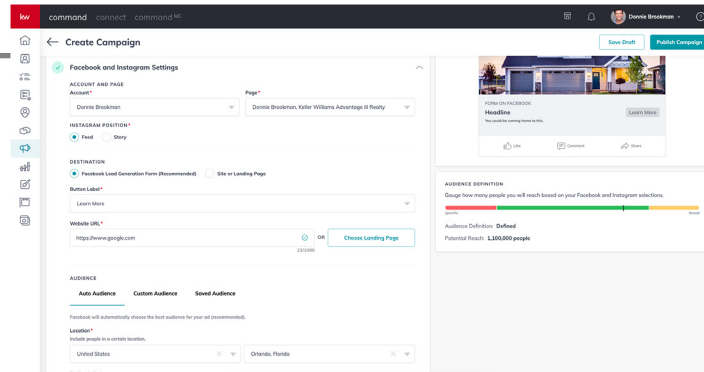
Agents can run social media ads through Command on Facebook, Instagram, Twitter, and Google. Campaigns > Social Ads provides a dashboard to monitor ads and track leads. Leads captured are added to Contacts. Lead settings allow for auto-tagging & triggering SmartPlans. Listings are connected to bring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

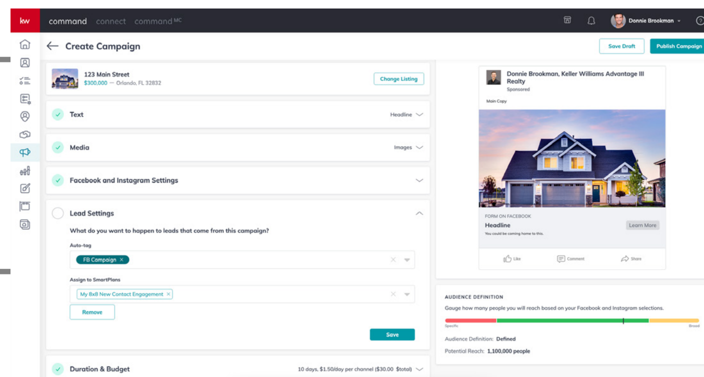
SOCIAL SETTINGS

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



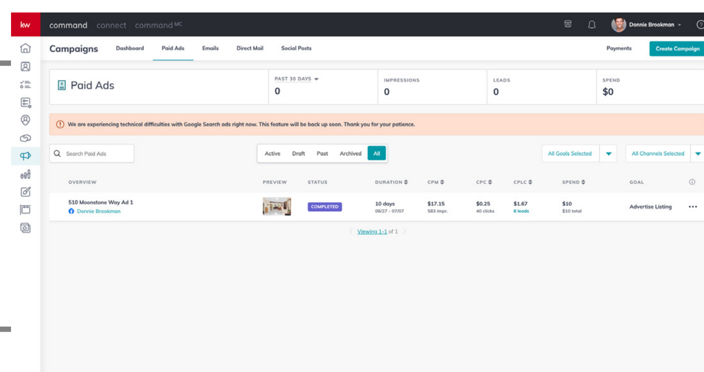
LEAD SETTINGS AND BUDGET

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



2. Hire to the Organization Chart

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

Director of Lead Generation

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

Database Manager

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

ISA

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

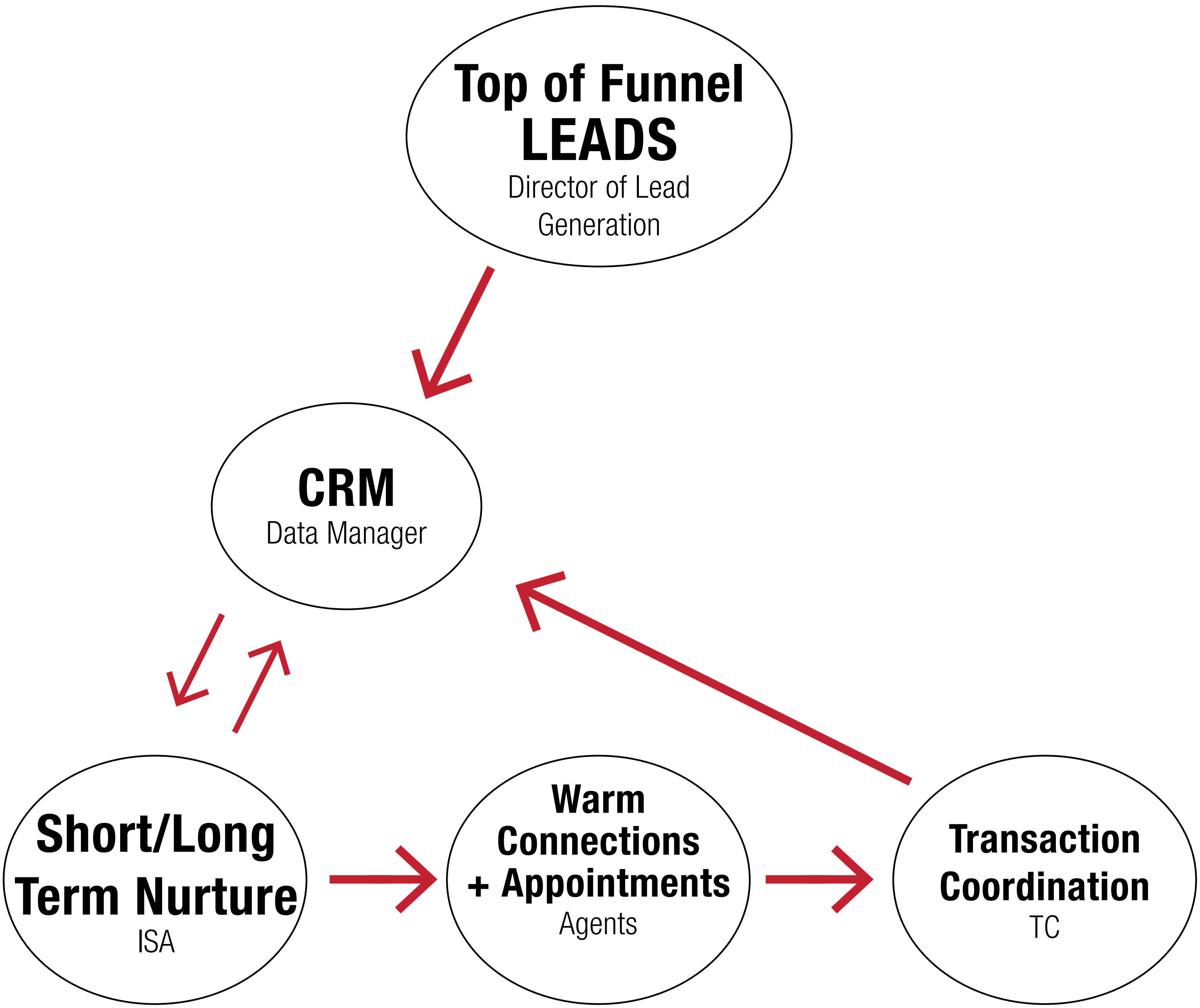
Transaction Coordination

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

2. Hire to the Organization Chart - The Organization Chart

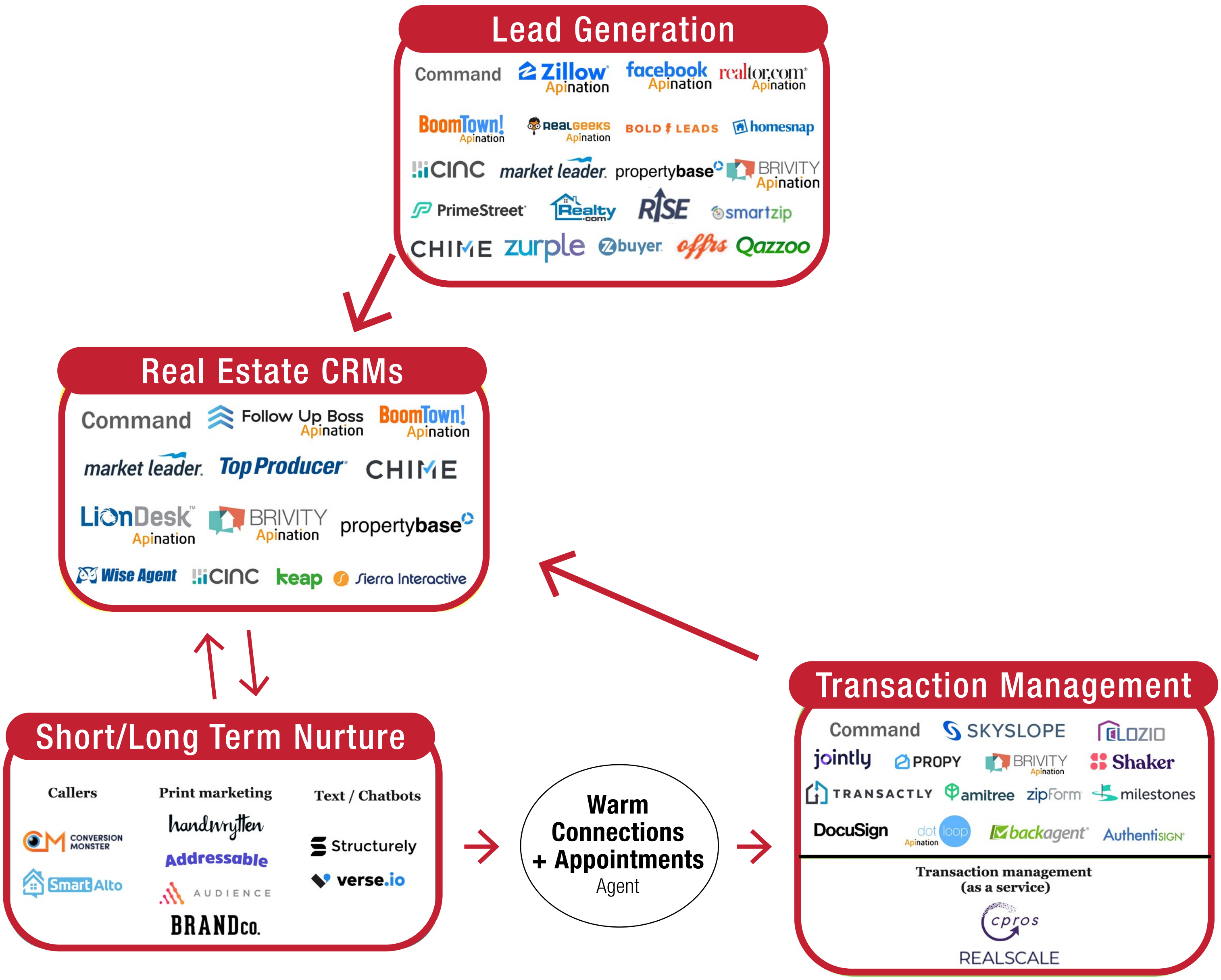
Hire

If you choose to hire talent



2. Hire to the Organization Chart - The Organization Chart

Hire it Done
If you choose to partner with vendors



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3. Identify Agents, Train, and Hold Agents Accountable

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

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

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

Train

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

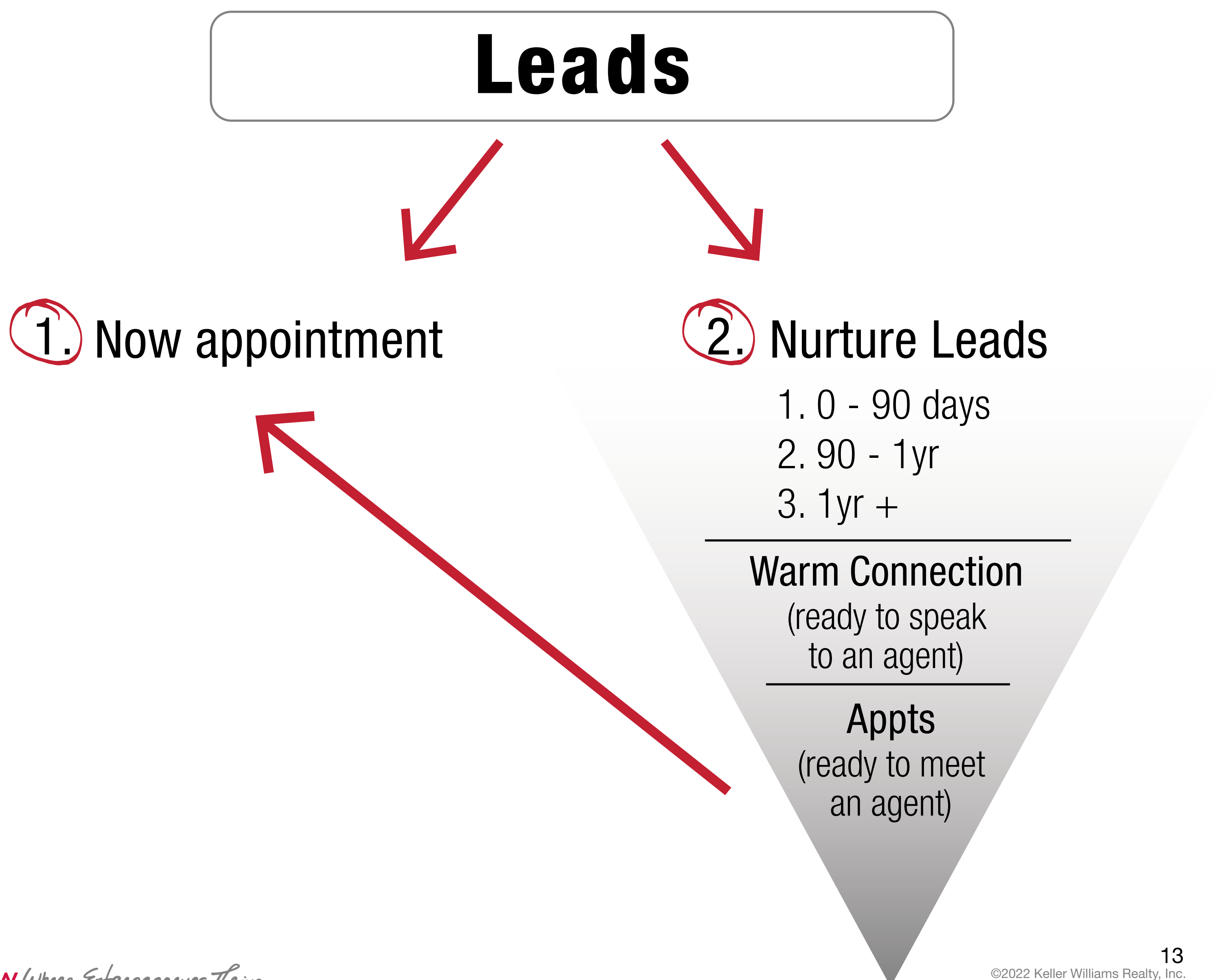
Coach to Accountability in One-on-One Sessions

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

4. Qualify the Lead

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

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



5. Nurture Future Business

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

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

2. The frequency and intensity depend on how soon they want to transact.

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

3. Assign leads to stages

HOT

Leads who are ready, willing, and able to transact in the next 90 days get the highest touches in terms of both frequency and intensity. These are your HOT buyers and sellers. Your ISA calls these leads once a week with personal communication to build the relationship and sends timely real estate information. Buyer clients get instant saved search updates, and; sellers receive a saved search for their neighborhood.

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

NURTURE

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

WATCH

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

LEAD POOL or ARCHIVE

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

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

The next page shows an illustration of the Sales Pipeline.

5. Nurture Future Business - Sales Pipeline

HOT
(0-90 days)
1. Manual Reminder established by Agent/ISA, voice to voice communication minimum once per week
2. Saved Search set
   Buyer = weekly
   Seller = weekly

NURTURE
(91 days - 1 year)
1. Manual Reminder established by Agent/ISA, voice to voice communication at least 2 times per month
2. Saved Search set
   Buyer = bi-weekly
   Seller = bi-weekly

WATCH (1 year +)
1. Calls - voice to voice communication at least 1 time per month
2. Saved Search set
   Buyer = monthly
   Seller = monthly

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

ARCHIVE
1. **Bad contact info**
2. **On the DNC list**

RULES

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

5. Nurture Future Business - Laws of the Pipeline

Option #1 - Using Tags for New Lead Flow Process

Tags to Create: 12 DAY PLAN and LEAD POOL

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

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

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5. Nurture Future Business - Laws of the Pipeline

Option #2 - Using Opportunities for New Lead Flow Process

Tags to Create: 12 DAY PLAN and LEAD POOL

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

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

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

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Laws of the Pipeline Key

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

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

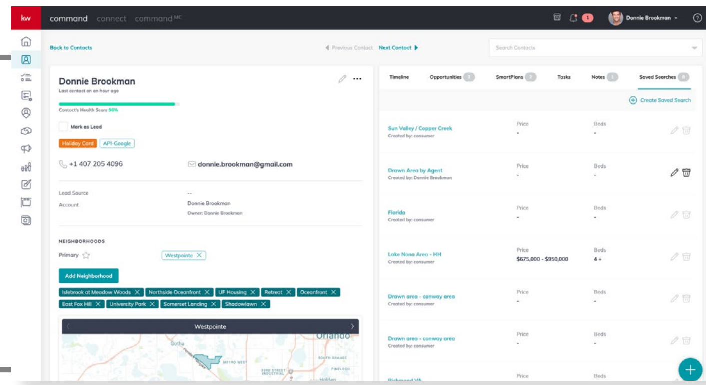
Following the Laws of the Pipeline, you can use
Option 1: System Tags
Option 2: Opportunity Stages

#12 SET UP SEARCHES

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.

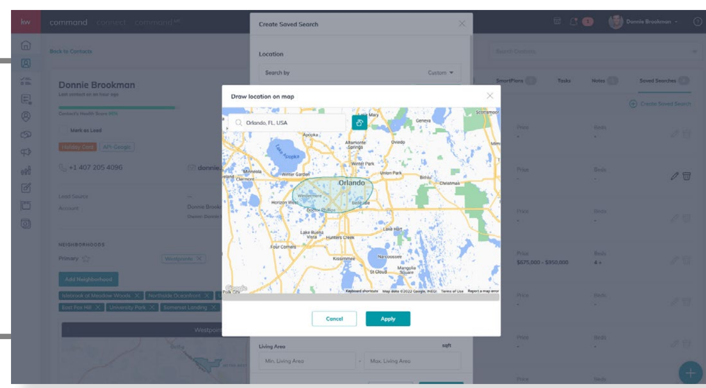
MANAGES SAVED SEARCHES

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



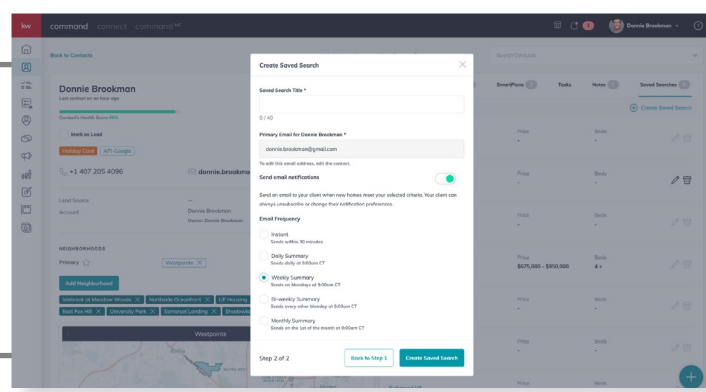
CUSTOMIZE SEARCH

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
3. Consumer can view and customize notifications from connected profile.



6. Manage the Database

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

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

A 36 Touch consists of the following elements:

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

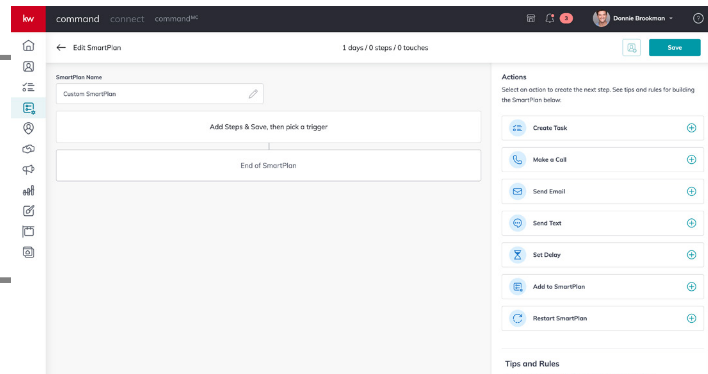
#21 CREATE FOLLOW-UP PLANS

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

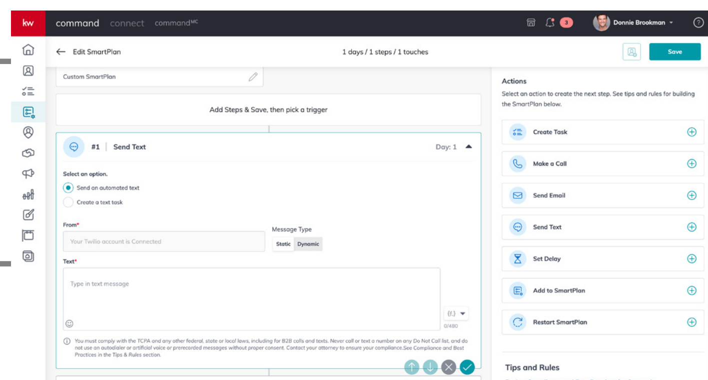
1. Open SmartPlans and choose "Create"
2. Add steps from right to customize plan

**Teams can also designate an assignee for each step - either Rainmaker or Contact assignee.*



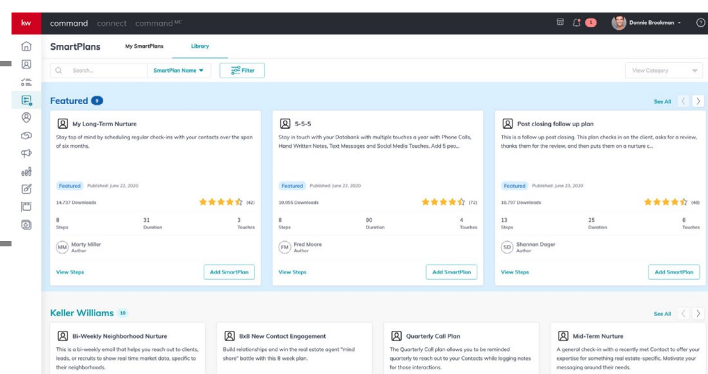
CUSTOMIZE STEPS

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



BROWSE SMARTPLAN LIBRARY

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



THE MATH - Case Study #1

Net $100,000

Assumptions:

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

$12,000 GCI

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

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

THE MATH - Case Study #2

Net $500,000

Assumptions:

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

$12,000 GCI

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

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

"Your network is your netWORTH."

"Your database is your business."

"The path is in the math."

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

TEAMERAGE.