

Regional Leadership Manual

The Tip of the Spear



Kim Harryman

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Acknowledgments

The author gratefully acknowledges the assistance of the following individuals in the creation of this course:

Bruce Virgil	Jennifer Roach	Mo Anderson
Darrell King	John Davis	Owen Gibbs
Dianna Kokoszka	Mark Willis	Samantha Garza
Gary Keller	Mary Hibbing	Shelley Gonzalez
Jeff Ryder	Mary Tennant	Tamara Hurwitz

Note

The concepts outlined in this Regional Leadership Manual are further explained and expanded in regular Regional Leadership meetings coordinated by KWRI. Regional Leadership teams are responsible for participating in these meetings for a complete understanding of the evolving systems and models used to lead and grow our system.

Notes

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Introduction

Notes

Regional Leadership – Growth, Opportunity, and Responsibility

The Tip of the Spear

For Keller Williams Realty, succeeding through others is the highest form of success we can imagine. Our goal is to create unimaginable growth and opportunity, both professionally and personally, for the people that have joined our family.

Regional Representatives are the drivers of our success, and their leadership has an incalculable impact on the lives of everyone in our system. They are the key players in enriching the lives of our associates, by pushing our systems and models and steadfastly finding new opportunities for our people.

Regional leadership is the tip of the spear in our system. You as Regional leaders have a tremendous opportunity to provide opportunity, for which there is no limitation. We will never reach our potential because our potential is limitless.

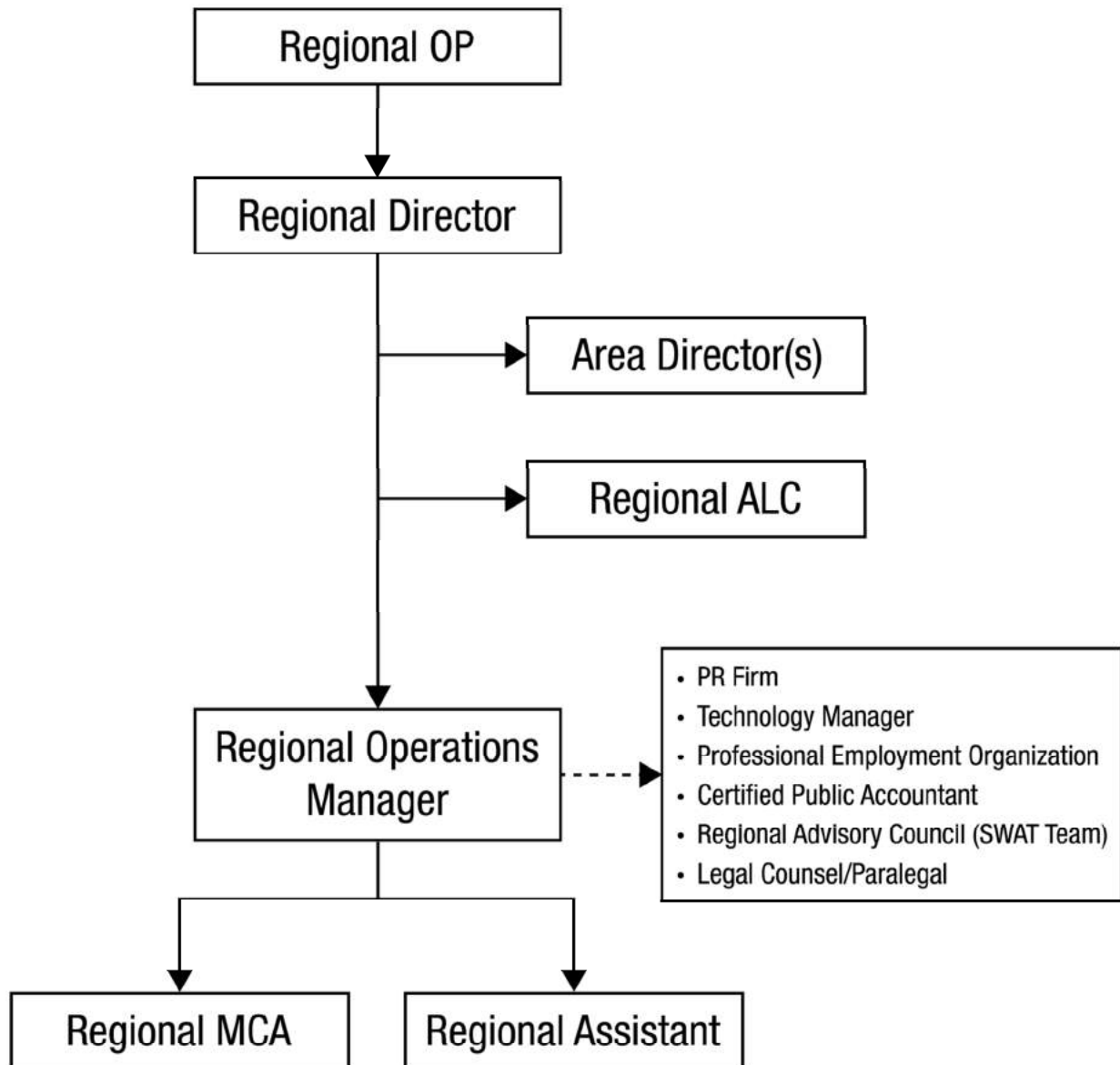
Notes

Chapter 1: Regional Leadership and Operations

1. Regional Leadership Structure
2. Regional Leadership Roles and Responsibilities
3. Regional Expectations – Goal Setting and
Achievement

Notes

Regional Leadership Model



Notes

How Regional Leadership Is Evaluated

Regional Director Areas of Accountability	
1. Agent Count	<ul style="list-style-type: none"> Gross recruiting numbers of associates in the existing Market Centers in the Region are increasing. Market Centers implement retention systems to increase net associates as well. New Market Centers
2. Owner Profit	<ul style="list-style-type: none"> Increased agent count and productivity results in increased Owner Profits.
3. Royalty	<ul style="list-style-type: none"> Agent count and productivity in the Region is increasing, which results in increased Royalty.
4. Commitment	<ul style="list-style-type: none"> Commitment issues in the Region are decreasing to a minimal amount, meaning that models and systems are being utilized and making the Market Centers, Region, and KWRI stronger.
5. Culture	<ul style="list-style-type: none"> Foster a culture of abundance by driving opportunities for our people. Market Center leadership and associates embrace the culture and treat each other, and others, well. Regional leadership communicates “carefrontationally” leading their Market Centers to operate using our models and systems at the highest level.

Regional Operating Principal Job Profile

Job Standards

1. **Primary Objectives** – *What are the major objectives or outcomes to be accomplished by the person in this job?*
 - Exercise accountability and support for Regional Director
 - Assure that Regional Director maintains a tight fiscal policy in order to maximize profit
 - Review profit and loss with Regional Director monthly
 - Review and approve budget annually and update semi-annually
 - Review plans and programs for growth with Regional Director
 - Assure that the Region maintains the highest ethical standards and levels of professional performance
2. **Regular Work Activities** – *What are the most frequent and most essential work activities in this job?*
 - Talent Search
 - Use RSTLM process to select and retain Regional Director when appropriate
 - Ensure Regional Director follows RSTLM and lead generation strategy to bring in new Operating Principal candidates
 - Approve prospective Operating Principal candidates proposed by Regional Director
 - Approve new Market Center opportunities within the Region
 - Maintain direct and open communication with the Regional Director
 - Stay abreast of changes and trends within the Region and within the industry
 - Review finances frequently to keep awareness of Regional profitability
 - Hold regular accountability sessions with Regional Director
 - Establish goals, plans, and budgets with the Regional Director and track progress regularly
3. **Management Responsibilities** – *How many people and which roles will be directly managed by this person?*
 - Regional Director
4. **Key Skills** – *What behavioral traits, attitudes, and skills are required?*
 - Strong leadership, management, and financial skills
 - Goal setting, planning, and accountability skills
 - Problem-solving skills

5. People Contacts and Interactions – *What are the primary people contacts in this job (who, why, and how often)?*

- Regional Director – daily
- OP Masterminds at the Local, Regional, and International level
- Assist new Operating Principals in the Region with sharing experiences
- Other owners at regularly called meetings by KWRI– monthly, quarterly, or annually

6. Compensation – *Fill in as appropriate for your organizational structure.*

Job Requirements

Experience, Training, and Education – *What prior work and life experience will help the person in this role succeed? (Education, industry-specific, sales, administrative, management, customer-service)*

- Residential real estate experience, knowledge, and skill with above-average sales success
- Strong financial background running successful business
- A track record of success
- A history of involvement as a leader
- Experience in management of a team or staff

Regional Director Job Profile

Job Standards

1. **Primary Objectives** – *What are the major objectives or outcomes to be accomplished by the person in this job?*
 - Grow the Region
 - Increase Agent count
 - Increase Market Center count
 - Increase GCI
 - Increase Owner Profit
 - Increase Profit Share
 - Increase Royalty
2. **Regular Work Activities** – *What are the most frequent and most essential work activities in this job?*
 - Talent search
 - Lead the Region in Mission, Vision, Values, Beliefs, and Perspective
 - Promote KWU and KW MAPS programs to train and support the Market Centers
 - Use the RSTLM process to select the right Operating Principals
 - Oversee the creation and implementation of goals, plans and budgets
 - Solve problems and exploit opportunities!
3. **Management Responsibilities** – *How many people and which roles will be directly managed by this person?*
 - Area Director(s) (if any)
 - Regional Operations Manager
4. **Key Skills** – *What behavioral traits, attitudes, and skills are required?*
 - Driven to build the Region, fast, solid, and profitable
 - Extraordinary people skills
 - Leadership, management, and team-building skills
 - Commitment to models and systems
 - Business-savvy
 - Problem-solving skills
 - Results-oriented
 - Training Skills
 - Consulting Skills
 - Self-directed and lifelong learner
 - Authentic
 - Passionate
 - High integrity
 - Managerial courage
 - Steward of the quality of the Region
 - Master of RSTLM (Recruit-Select-Train-Lead-Motivate)

- 5. People Contacts and Interactions** – *What are the primary people contacts in this job (who, why, and how often)?*
- Area Director(s) (if any) – daily
 - Regional Operations Manager – daily
 - Operating Principals in the Region – weekly, monthly
- 6. Compensation** – *Fill in as appropriate for your organizational structure.*

Job Requirements

Experience, Training, and Education – *What prior work and life experience will help the person in this role succeed? (Education, industry-specific, sales, administrative, management, customer-service)*

- Strong track record in residential real estate sales
- Strong track record in residential real estate management
- Superior knowledge and implementation of the KW business models, systems, and culture—walks the talk
- Highly successful KW OP or TL
- Background in training is a plus

Area Director Job Profile

Job Standards

1. **Primary Objectives** – *What are the major objectives or outcomes to be accomplished by the person in this job?*
 - Increase Agent count
 - Increase Market Center count
 - Increase GCI
 - Increase Owner Profit
 - Increase Profit Share
 - Increase Royalty
2. **Regular Work Activities** – *What are the most frequent and most essential work activities in this job?*
 - Talent search
 - Lead the Region in Mission, Vision, Values, Beliefs, and Perspective
 - Promote KWU and KW MAPS programs to train and support the Market Centers
 - Use the RSTLM process to select the right Operating Principals
 - Oversee the creation and implementation of goals, plans and budgets
 - Solve problems and exploit opportunities!
3. **Management Responsibilities** – *How many people and which roles will be directly managed by this person?*
 - Regional Operations Manager (if delegated by Regional Director)
4. **Key Skills** – *What behavioral traits, attitudes, and skills are required?*
 - Driven to build the Region, fast, solid, and profitable
 - Extraordinary people skills
 - Leadership, management, and team-building skills
 - Commitment to models and systems
 - Business-savvy
 - Problem-solving skills
 - Results-oriented
 - Training Skills
 - Consulting Skills
 - Self-directed and lifelong learner
 - Authentic
 - Passionate
 - High integrity
 - Managerial courage
 - Steward of the quality of the Region
 - Master of RSTLM (Recruit-Select-Train-Lead-Motivate)

- 5. People Contacts and Interactions** – *What are the primary people contacts in this job (who, why, and how often)?*
- Regional Operations Manager – daily
 - Operating Principals in the Region – weekly, monthly
- 6. Compensation** – *Fill in as appropriate for your organizational structure.*

Job Requirements

Experience, Training, and Education – *What prior work and life experience will help the person in this role succeed? (Education, industry-specific, sales, administrative, management, customer-service)*

- Strong track record in residential real estate sales
- Strong track record in residential real estate management
- Superior knowledge and implementation of the KW business models, systems, and culture—walks the talk
- Highly successful KW OP or TL
- Background in training is a plus

Regional Operations Manager Job Profile

Job Standards

1. **Primary Objectives** – *What are the major objectives or outcomes to be accomplished by the person in this job?*

Support recruiting, increase retention, and drive productivity through the implementation of powerful and purposeful Regional systems

- Be an ambassador for KW and the Region to the Market Centers and associates
 - Support growth in the Region by creating and refining powerful systems for lead generation, cultivation, and Recruit-Selecting the very best Market Center Operating Principals and their core groups
 - Support the launching Market Centers in the Region by creating and refining powerful systems for training MC leadership on MC processes and procedures
 - Develop and implement a world-class and profitable training program at the Regional level
 - Prepare Regional budgets and manage expenses
2. **Regular Work Activities** – *What are the most frequent and most essential work activities in this job?*
 - Learn the KW models and systems for agents, Market Centers, and Regions
 - Events management including: OP/Team Leader Meetings, Regional ALC Meeting/Retreat, KWU Events, RED Day, Calendar of Events and Regional Leadership and Culture Summit
 - Supports Launch campaigns
 - Attends all KW events
 - Prepares Regional Leadership meeting agendas, meeting room, materials, and fosters full attendance and participation
 - Ensures that all events are profitable by reviewing event budgets, tracking forms, and controlling costs
 - Researches and strategizes how to make the Region stronger and more profitable
 - Assists OPs, TLs, MCAs, and RD with questions and needs regarding recruiting, training, and budgeting efforts
 - Supports Regional Leadership with franchise growth and other goals
 - Screens recruiting candidates, schedules recruiting appointments, supports recruiting presentations, and follows up with potential candidates

- Maintains recruiting database and recruiting packets
 - Creates newsletter and reports
 - Maintains communications via mail, email, fax, and voice mail
 - Responsible for new projects/systems development
 - Maintains all computer data
 - Follows up with real estate referrals
 - Oversees the duties and responsibilities of the Regional MCA and Regional staff
 - Drives the implementation of “standards and process”
- 3. Management Responsibilities** – *How many people and which roles will be directly managed by this person?*
- Regional MCA
 - Regional staff
- 4. Key Skills** – *What behavioral traits, attitudes, and skills are required?*
- Administrative skills
 - Negotiation skills
 - Leadership, management and team- building skills
 - Results-oriented, problem-solving skills
 - Organizational capabilities
 - People skills
 - Self-directed and lifelong learner
- 5. People Contacts and Interactions** – *What are the primary people contacts in this job (who, why, and how often)?*
- Regional Director and Area Director – daily
 - Market Center leadership – weekly and as needed
 - RMCA and Regional staff – daily and as needed
 - KWRI – as needed
- 6. Compensation** – *Fill in as appropriate for your organizational structure.*

Job Experience

Experience, Training, and Education – *What prior work and life experience will help the person in this role succeed? (Education, industry-specific, sales, administrative, management, customer-service)*

- Knowledge of Real Estate practices, including applicable state and local laws and regulations
- Track record in Events management
- Experience in start-up business operations
- Experience in creating business systems
- Knowledge of basic business software

Notes

Regional MCA Job Description

- Provides support to MCAs
- Attends meetings of the MCAs in the Region to discuss MCA issues
- Implements and maintains KW system to track Regional numbers and reports
- Assists Region to develop annual goals and budgets for the Region and MCs
- Conducts quarterly Regional MCA Meetings
- Coordinates annual MCA training
- Assists Market Centers that have an MCA vacancy or absence
- Interviews MCA candidates
- Works with new MCAs on one-on-one basis
- Financial reviews of MCs and ensures that reconciliation is completed monthly
- Pulls monthly numbers and highlights accounts that are overbudget and investigates budget variances from previous month transmittal
- Trending reports – tracks key numbers
- Monitors and supports launching Market Centers in setup and utilization of KW systems

Market Center Key Responsibilities

OP	Team Leader	MCA
<p>Key Responsibilities:</p> <ol style="list-style-type: none"> 1. Talent search. 2. Drive the creation of goals, plans, and budgets. 3. Use the RSTLM process to select the right Team Leader. 4. Track progress to goals, plans, and budgets with the Team Leader. 5. Hold Team Leader accountable. 6. Train and consult Team Leader. 7. Build bench strength. <p>Vision Capital Accountability</p>	<p>Key Responsibilities:</p> <ol style="list-style-type: none"> 1. Grow the Market Center. 2. Talent search. 3. Recruit, train, and consult associates. 4. Lead team meetings. 5. Use the RSTLM process to select the right MCA. 6. Action focus train MCA. 7. Lead MCA to professional and positive results. 8. Hold MCA accountable. 9. Implement KWU in the Market Center. 10. Profitability. <p>Recruit Train Consult</p>	<p>Key Responsibilities:</p> <ol style="list-style-type: none"> 1. Show value in the Market Center by using the Value tools. 2. Keep the Market Center's books. 3. Action-Train/Lead the staff and hold them accountable. 4. Maintain accounting, agent, employee, and contract files. 5. Help keep office and Team Leader on track and productive. 6. Tools updated and used consistently. 7. Market Center office management. 8. Assist Team Leader with agent/employee orientation and training. 9. Provide computer services as needed for all systems. <p>Manage Office Systems Retention</p>
<p>Accountable for achieving these results:</p> <ul style="list-style-type: none"> • Profitable and Profit Sharing Market Center • 100K-plus profit • Developing and retaining a great TL • Holding TL accountable to activities that lead to results. 	<p>Accountable for achieving these results:</p> <ul style="list-style-type: none"> • Profitable and Profit Sharing Market Center • 200-plus associates • Expense management • Productivity • Sales volume • Highly functional ALC • Tools are being used 	<p>Accountable for achieving these results:</p> <ul style="list-style-type: none"> • On-time transmittal • Zero AR balance • Prompt and accurate entry of listings, DAs, contracts, etc. • Facilities overview

Lead the Region Using KW Systems

Basics of Regional Operations

1. Hire talent. Run with fewer staff.
2. Develop and empower self-managed people.
3. Build teamwork and synergy.
4. Focus on models and systems that lead to results, and hold people accountable.
5. Measure all important outcomes and provide consistent feedback.
6. Educate everyone about each person's primary responsibilities.
7. Focus on the "Big Rocks"—the 20 percent that leads to 80 percent of the results.
8. Establish, protect, and enhance a "Productivity Specific Environment."
9. Recruit owners and staff who are "learning based" and committed to mastery.
10. Encourage progress and celebrate success!
11. "Walk the Talk" at the highest level.

Notes

Online Goal Setting

Regional leadership establishes and maintains an opportunity and accountability mindset across the system. The first step in accountability is goal setting. OPs should submit their goals for the year to the Region by November 15. Once approved by the Region, the Market Center should enter their goals for the year into the KW Intranet by December 10. This will provide you with several monthly reports, including the **Vital Signs** (see “Tracking Your Region with KW Reports”), which you can use to consult.

The screenshot shows the '2015 Goal Entry' interface. A black arrow points from the 'Goals' section of the text above to the 'GOALS' logo and the '2015 Goal Entry For:' section of the interface.

The **Goals** section of the KW Intranet allows you to:

- Enter and track your **Recruiting** goals.
- Enter and track your **Production** goals.
- Enter and track your **Financial** goals.
- Enter and track your **Assumptions** about your goals.

How to Enter Numbers

All Regions must submit their annual Recruiting, Production, and Financial Goals to the KW Intranet by December 10th annually per the Regional Representative Agreement.

- Goal Entry only accepts positive whole numbers, so please do not enter decimals or negative numbers.
- Please do not enter non-numeric values in each field (such as “\$” or “,” or “.”).

Moving between fields requires using the Tab Key. Using the Enter key will take you out of the field and you will have to reselect the field you want.

Save vs. Submit

IMPORTANT NOTE: You should “Save” your work every ten minutes.

The **Save** button stores your **Goals (Recruiting, Production, Financial)** and **Assumptions** locally. This allows you to tackle the task of entering your goals over a series of days, prior to submitting them for review by the KWRI executive staff.

When you have finished entering all of your goals, click Submit.

The **Submit** button sends your finalized Goals (Recruiting, Production, Financial) and Assumptions to KWRI for review. Once you **Submit** Completed Goals, the **Save** feature is no longer an option.

Logging into the Intranet Goal Entry Site

1. Go to <http://intranet.kw.com/webmore/>
2. Enter your Username and Password, and select Goals (If you select Intranet from the Login page, you will have to logout and try again).
3. Verify that the role displayed is **Regional Director**.

2015 Goal Entry For:

Goal Entry Status: Initialized

Goal Upload:

Available Actions:

Important Hints:

- You must enter values in all goal tracking fields.
- Enter only positive, whole numbers.
- Save your work often.
- Submit only when you are finished.

Recruiting Goals

	Beginning Agent Count	Agents Added	Agents Removed	Net Agent Change	Active Agent Count	Beginning Cost	Agent Count	Cost	Agents Added	Cost	Agents Removed	Net Cost	Agent Change	Total Cost	Agent Count
Jan	0			0		0						0			
Feb	0			0		0						0			
Mar	0			0		0						0			
Apr	0			0		0						0			
May	0			0		0						0			
Jun	0			0		0						0			
Jul	0			0		0						0			
Aug	0			0		0						0			
Sep	0			0		0						0			
Oct	0			0		0						0			

4. You can upload your goals from your Forecast Spreadsheet.

The **Market Center Forecast Model and Instruction Guide** is now available on the **Regional Intranet**.

To access the Forecast Model information, follow the steps below:

1. Log in to <http://intranet.kw.com>
2. Select the **Resources** tab.
3. Select **Documents** on the left sidebar.
4. Select **Software** under **Documents**. You will then see link to the new **Forecast Materials** in the middle of the page.
5. Right-click on the particular link and select **Save target as** to save any of the files that are listed
6. Determine the folder (i.e., Desktop) where you would like to place the file and select **Save**.
7. You may then open the file from the folder selected.
8. Once opened the Forecast Model and/or Instructions can be used as needed or printed out.

It is important that you read the Market Center Forecasting Instructions first. This is a step-by-step guide on how to set up and use the forecast spreadsheet as well as additional information on how to upload your forecasting numbers into the online Goals tool. **Goals may only be uploaded upon initial creation for each year. Subsequent changes and updates will be handled through the goals application (see below).**

or

You can enter goals directly on the screen (see the following pages).

Entering Your Regional Recruiting Goals for the Year

- Click on the Recruiting button and, in the resulting screen, enter your Regional goals for:
 - Beginning Agent Count — as of January 1
 - Agents Added — Number of agents recruited and sponsored into your Region for each month
 - Agents Removed — Number of agents removed from your Market Centers for each month
 - Beginning Contributing Agent Count — The total number of contributing agents in a Market Center at the beginning of a given period
 - Contributing Agents Added — Number of contributing agents added to your Market Centers during a given period
 - Contributing Agents Removed — Number of contributing agents removed from your Market Centers during a given period

Be sure to add the information for agents added and agents removed for EVERY month. You will notice that the **Net Agent Change** and **Active Agent Count** are automatically calculated for you.

2015 Goal Entry For:

Goal Entry Status: Initialized

Goal Upload:

Available Actions:

Important Hints:

- You must enter values in all goal tracking fields.
- Enter only positive, whole numbers.
- Save your work often.
- Submit only when you are finished.

Recruiting Goals

	Beginning Agent Count	Agents Added	Agents Removed	Net Agent Change	Active Agent Count	Beginning Cont. Agent Count	Cont. Agents Added	Cont. Agents Removed	Net Cont. Agent Change	Total Cont. Agent Count	
Jan											Jan
Feb											Feb
Mar											Mar
Apr											Apr
May											May
Jun											Jun
Jul											Jul
Aug											Aug
Sep											Sep
Oct											Oct
Nov											Nov
Dec											Dec

- Click **Save** after you have entered all your **Regional Recruiting Goals**.

Entering Your Regional Production Goals for the Year

1. Click on the **Production** button and, in the resulting screen, enter your Region goals for:
 - **Market Centers Added** – The number of new Market Centers added each month along with the compiled goals from your Market Centers for the categories listed below.
 - **Listings Taken** – Number of listing contracts entered into with sellers during each month
 - **Listings Taken Volume** – Total initial listing price for all listings taken during each month
 - **Listings Sold** – Number of listings that go to sales contract and then to a completed closing
 - **Listings Sold Volume** – Total of the final sales prices of the listings sold during each month
 - **Contracts Written** – Number of real estate contracts that are entered into and approved by both a buyer and a seller
 - **Contracts Written Volume** – Total of the agreed upon sales price for all contracts written during each month
 - **Contracts Closed** – Number of real estate contracts that are completed—monies dispersed and ownership changed
 - **Contracts Closed Volume** – Total of the final sales prices of all contracts closed during each month
 - **Cappers** – An individual who produces sufficient GCI and contributes enough Company Dollar to the Market Center to satisfy his/her annual commission Cap requirement. At their anniversary date, the associate starts over.
 - **Producing Agents** – Number of contributing agents who had at least one contract written in a given period.
 - **Listing Agents** – Number of contributing agents who had at least one new listing in KWLS in a given period.

Be sure to add the information in each category for EVERY month for the year. You will notice that the Totals are automatically calculated for you.

Click **Save** after you entered all your **Regional Production Goals**.

Entering Your Regional Financial Goals for the Year

- Click on the Financial button and, in the resulting screen, enter your Regional goals for the following. Where the instructions refer to “Market Center,” your entries will reflect a total of the Market Centers in your Region.

- **Paid Volume** – Closed Volume on which company dollar is collected
- **GCI** – Gross Commission Income - Commission Revenue plus bonuses minus referrals minus concessions
- **Company Dollar** – Amount of Gross Commission Income (GCI) that is paid to the Market Centers
- **Approved Expenses** – Market Centers’ operating expenses, as allowed by KW guidelines prior to calculation of KW Profit Sharing
- **Profit Share** – Amount of Market Center profit that is sent to KWRI for distribution to the Profit Share Tree
- **Franchise Royalty** – 6 percent of GCI up to \$3,000 per year
- **Owners Profit** – Market Center Owner’s pre-tax net income after operating expenses and Profit Sharing for that time period
- **True Expense** – Grand Total Operating Expenses minus Federal taxes minus Other Total Inside Income is considered True Expense
- **Outside Income** – Total of Outside Income in a Market Center during a given period

Be sure to add the information in each category for EVERY month of the year. You will notice that the totals are automatically calculated for you.

- Click **Save** after you have entered all your **Financial Goals**.

2015 Goal Entry For:

Goal Entry Status: Initialized

Goal Upload: Browse...

Available Actions:

Important Hints:

- You must enter values in all goal tracking fields.
- Enter only positive, whole numbers.
- Save your work often.
- Submit only when you are finished.

Recruiting Production Financial Assumptions

Recruiting Goals													
	Beginning Agent Count	Agents Added	Agents Removed	Net Agent Change	Active Agent Count	Beginning Cost	Agent Count Cost	Agents Added Cost	Agents Removed Cost	Net Cost	Agent Change	Total Cost	Agent Count
Jan	0			0		0				0			
Feb	0			0		0				0			
Mar	0			0		0				0			
Apr	0			0		0				0			
May	0			0		0				0			
Jun	0			0		0				0			
Jul	0			0		0				0			
Aug	0			0		0				0			
Sep	0			0		0				0			
Oct	0			0		0				0			
Nov	0			0		0				0			
Dec	0			0		0				0			
Total													

Enter Your Assumptions for the Year

1. Click on the **Assumptions** button and, in the resulting screen, there is only one field. In this field, you can make notes about why your goals have been set at these levels.

For example, if you know that there is a large corporation moving to an area, and predictions are that new home sales will increase by 15 percent over the next year to accommodate relocations, that may have influenced your decision to increase your production goals by 15 percent. By making notes accordingly in Goal Entry, you will be reminded of this assumption if you want to remember at a later date.

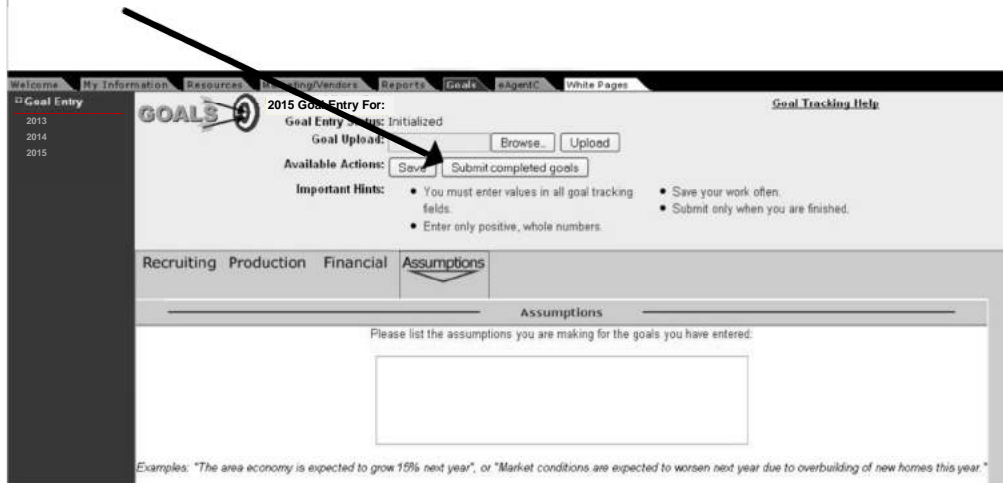
Please note that this **Assumptions** screen will only appear the first time you enter goals into the Goal Entry system, save them, and submit them. We will explain more about this later.

The screenshot shows the '2015 Goal Entry For: Assumptions' screen. The top navigation bar includes links for Welcome, My Information, Resources, Marketing/Vendors, Reports, Goals, eAgentC, and White Pages. The left sidebar has a 'Goal Entry' section with years 2013, 2014, and 2015. The main content area is titled '2015 Goal Entry For:' and shows 'Goal Entry Status: Initialized'. Below this is a 'Goal Upload:' section with 'Browse...' and 'Upload' buttons. The 'Available Actions:' section includes 'Save' and 'Submit completed goals' buttons. 'Important Hints:' are listed: 'You must enter values in all goal tracking fields.', 'Enter only positive, whole numbers.', 'Save your work often.', and 'Submit only when you are finished.' A tabbed interface at the bottom shows 'Recruiting', 'Production', 'Financial', and 'Assumptions' (which is selected). The 'Assumptions' tab contains a large text area with the prompt 'Please list the assumptions you are making for the goals you have entered.' and examples: 'The area economy is expected to grow 15% next year', or 'Market conditions are expected to worsen next year due to overbuilding of new homes this year.'

2. Click **Save** after you have entered your **Assumptions**.

Submitting Your Goals for the Year

Click the **Submit completed goals** button.



The screenshot shows the 'GOALS' system interface. At the top, there is a navigation bar with links: Welcome, My Information, Resources, Training/Vendors, Reports, Goals, AgentC, and White Pages. Below this, the main content area is titled '2015 Goal Entry For:'. It includes a 'Goal Upload:' section with 'Browse...' and 'Upload' buttons. Below that, the 'Available Actions:' section contains a 'Save' button and a 'Submit completed goals' button, which is highlighted by a black arrow. The 'Important Hints:' section lists several instructions: 'You must enter values in all goal tracking fields.', 'Enter only positive, whole numbers.', 'Save your work often.', and 'Submit only when you are finished.' Below the hints, there are tabs for 'Recruiting', 'Production', 'Financial', and 'Assumptions'. The 'Assumptions' tab is selected, showing a text area for 'Please list the assumptions you are making for the goals you have entered:'. At the bottom, there are examples of assumptions: 'The area economy is expected to grow 15% next year', or 'Market conditions are expected to worsen next year due to overbuilding of new homes this year.'

Please note that even though you have entered your initial goals and submitted them, you will be able to change your goals and resubmit them, as necessary.

Updating Your Goals for the Year

1. Even though you have entered your initial goals and submitted them, you will be able to change your goals and submit them again. After initial goal entry and submission, you will notice that a Reasons button has replaced the Assumptions button.

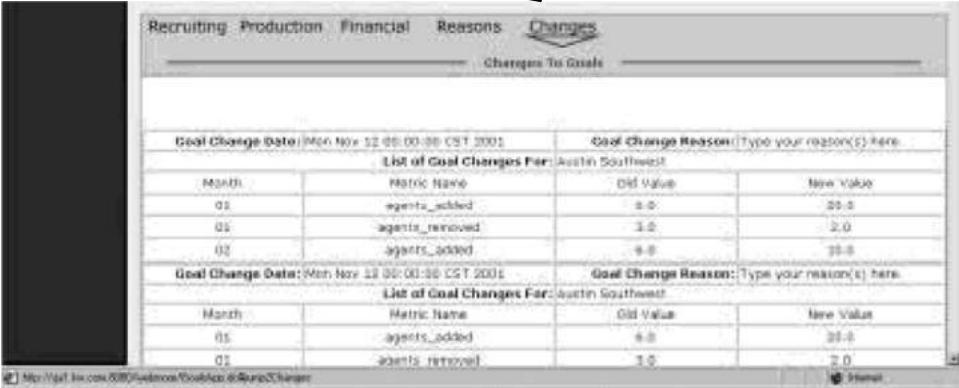
Enter your new set of goals.

The screenshot shows the 'GOALS' system interface. On the left, a sidebar lists years 2013, 2014, and 2015. The main content area is titled '2015 Goal Entry For: Submitted'. Below this, it says 'Available Actions: Re-submit changed goals'. An 'Important Note' section contains three bullet points: 'You must enter values in all goal tracking fields.', 'Enter only positive, whole numbers.', 'Save your work often.', and 'Submit only when you are finished.'. Below the notes, there are tabs for 'Recruiting', 'Production', 'Financial', and 'Reasons'. The 'Reasons' tab is selected, and an arrow points to it. Below the tabs, there is a section titled 'Reasons For Goal Changes' with a text area for 'Please specify the reason(s) for changing your goals.' and a note 'You must specify reasons before re-submitting goals.' Examples of reasons are provided at the bottom: 'Growth in the area economy was expected to be 15% but has actually been 20%', or 'Market conditions are worse than expected because a new competitor has emerged'.

2. Click on the **Reasons** button and enter a description of why you changed your goals. (This information will be sent to the KWRI Executive staff with the new goals you entered after you resubmit them.)
3. Click on **Re-submit changed goals**. Your new goals and reasons for the changes will appear in an Executive goal tracking report.

Viewing Updated Goals for the Year

After you have resubmitted changed goals, you can view all the changes you have made to your goals. Click on **Changes** for a complete record of changes to your goals.



Recruiting Production Financial Reasons **Changes**

Changes To Goals

Goal Change Date: Mon Nov 12 00:00:00 CST 2012		Goal Change Reason: (Type your reason(s) here)	
List of Goal Changes For: Austin Southwest			
Month	Metric Name	Old Value	New Value
05	agents_added	6.0	30.0
05	agents_removed	3.0	2.0
02	agents_added	6.0	30.0

Goal Change Date: Mon Nov 12 00:00:00 CST 2012		Goal Change Reason: (Type your reason(s) here)	
List of Goal Changes For: Austin Southwest			
Month	Metric Name	Old Value	New Value
05	agents_added	6.0	30.0
05	agents_removed	3.0	2.0

http://atl-1w.com/2012/atl1wcom/GoalApp/atl1wcom/Changes

Chapter 2:

Grow Your Region

1. Growth Within Existing Opportunities
 - The Growth Initiative
2. Growth from New Opportunities
 - Developing New Market Centers

Notes

What Is the Growth Initiative?

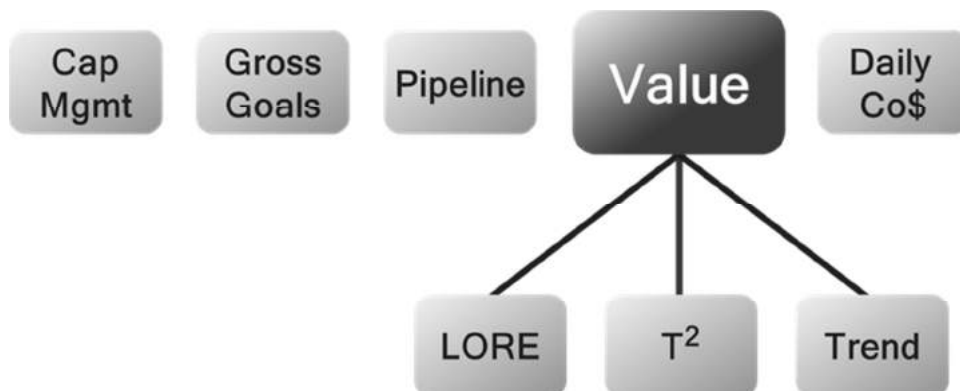
Designed to help Market Center leadership increase agent count through recruiting and retention systems, the Growth Initiative harnesses the power and synergy of proven tools to provide accountability around the activities that drive ongoing, sustainable growth.

Truth

Accountability should be based on activities and evidence, not emotions.

The Growth Initiative Tools

The Growth Initiative tools are all interconnected—their power is maximized when each one is used to build upon and support and strengthen the others.



Explain the Growth Initiative Tools!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them understand the opportunity provided by the Growth Initiative tools.

Lead Generation Tools

Lead generation tools provide resources for achieving gross recruiting goals.

Cap Mgmt

Cap Management

Your visionary tool. It sets the stage for how many Cappers you must have and when you must have them to have stable, predictable profitability.

Gross Goals

Gross Goals

Together with Cap Management, Gross Goals create a strategy for the overall recruiting numbers necessary to hit Market Center goals, giving you **gross** goals for both the number of recruits and agent mix (Cappers and non-Cappers).

Pipeline

Pipeline

Your Pipeline Report allows you to easily tell whether the recruiting activities of the Market Center are supporting your gross recruiting goals and where you need to focus your lead generation efforts.

APPOINTMENTS and GROSS are tied together

For gross recruits to go up, we must increase the number of appointments.

Value Tools

Value tools take us from gross recruit goals to net recruit goals.

LORE

The Language of Real Estate (LORE)

LORE attracts agents, especially Cappers, to your Market Center by providing evidence that we can help their business. This focus on Cappers is important because of a simple, natural law: your Market Center will have higher retention rates with Cappers than with rookie agents. Also, if you have a Market Center full of Cappers, other associates will be more likely to stay with you because associates want to be around successful associates. *A focus on bringing in Cappers is a focus on growing your net recruiting.*

T²

Training and Tracking (T²)

T² allows you to further demonstrate the value of training at the Market Center by linking the Keller Williams University training classes and Keller Williams Regional events to the production of the agents who attended. This provides evidence that Keller Williams leads to higher levels of production both for existing agents and potential recruits, leading to greater net numbers.

Trend

Trend Tool

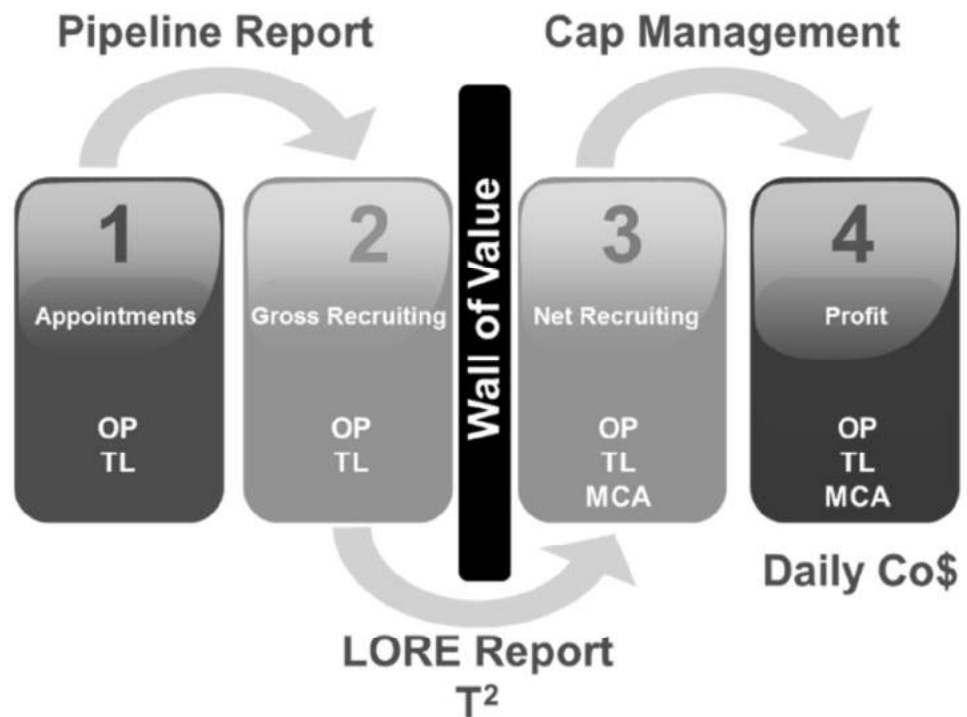
The Multi-Year Trends tool tells you how your Market Center is doing in creating value for your agents across a variety of metrics. It's a measuring stick for how your Market Center is improving compared to its own performance, the Region's performance, and Keller Williams Realty's performance.

The Wall of Value

When net goes up, profit goes up.

NET and PROFIT are tied together

For profit to go up, we must create and communicate our value in order to net recruits.



The “Wall of Value” works two ways: if you do show value, the wall is like a fortress that protects your net and your profitability. If you are not showing value, the wall actually works against you—it repels net and repels profit. The tools that communicate value are LORE, T², and the Trend Tool.

Daily Company Dollar (Daily Co\$)

Finally, from our net goals value tools, we move to Daily Co\$, which helps Market Centers answer the very fundamental business question: “Is our business improving?”



Daily Company Dollar Tool (Daily Co\$)

A daily focus on profitability leads to a greater comprehension of which parts of the Growth Initiative could be better implemented and improved in the Market Center. If you are not seeing the results you want from Daily Co\$, go back through your tools and refine your systems around implementing them. And when you do see the Daily Co\$ you want, it's time to raise the bar and grow to new heights.

Implementing the Growth Initiative

Regional leadership supercharges the growth goals of their Market Centers by providing Growth Initiative training, tools, and resources to Market Center leadership, and then holding them accountable to real achievement through their sustained activities.

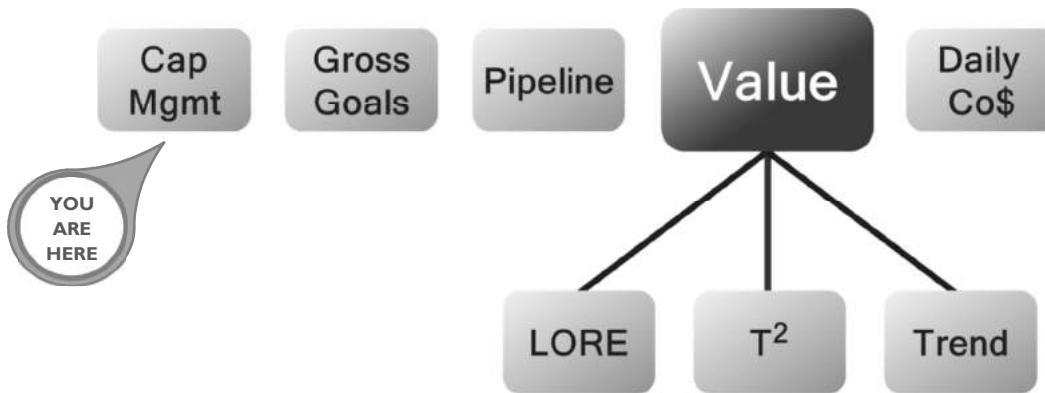
Get the Growth Initiative Tools!

You can easily access all of the Growth Initiative tools on MyKW! Just go to mykw.kw.com, sign in, and click on **Growth Initiative** in the Quick Links area at the bottom right of the page.

Notes

Cap Management

Where are we? Cap Management is the first of the Growth Initiative lead generation tools.



Overview

Cap Management is #16 in the KW Economic Fundamentals. It is a vision tool that sets the goal for the Cappers needed to ensure profitability in a Market Center. It is a monthly goal-setting tool created at the Market Center that allows Market Center leadership to focus on what months they need to add capping agents to the office. Cap Management has two significant benefits:

- **A cash flow game plan** for creating stable, predictable profitability to avoid the “cash flow rollercoaster.”
- **A unique advantage** that helps bring Cappers into the Market Center.

Implement Cap Management!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement Cap Management.

What Is Cap Management?

Think of Cap Management as your vision tool for a revenue strategy for the Market Center. It is about being in culture because culture is running profitable businesses. The Keller Williams model is that Cappers must take care of expenses. To determine how many Cappers are needed to cover expenses, we divide the annual amount of expenses in a Market Center by the amount of that Market Center's Cap. For example:

Market Center expenses = \$43,000 per month X 12 months = \$516,000
for the year

Cap = \$18,000

$\$516,000 \text{ in expenses} \div \$18,000 \text{ Cap} = 29 \text{ Cappers}$

But this only tells us how many Cappers we need to be profitable for the year. It doesn't tell us what's necessary to be profitable in any given month. Because our business can be seasonal, it's important to understand what our needs are on a monthly basis to insulate ourselves from this seasonality and ensure profitability year-round.

Look at most Market Centers' Owner Profits throughout a given year. What you'll see is that as we come off the second and third quarters of the year and move into the fourth quarter of the year and the first quarter of the next year, owner profit drops. In fact, the average drop for Keller Williams Realty from August to September is -39 percent; from August to November it is more than -50 percent.

Question: Is that something we need to accept or need to change?

Of course we need to change it. But it's not enough to say we won't accept that as a fate. We have to have a strategy to change it. And we have to work with our Market Center leadership to make sure we have buy-in from them and are working from the same strategy. This is what Cap Management does.

How Do We Use Cap Management?

Normally, an agent's Cap resets on the agent's anniversary date (the date they joined Keller Williams). When an agent joins they start paying Company Dollar immediately until they hit the Cap, at which point they stop paying Company Dollar until their anniversary date comes again—at that point the Cap resets and they begin paying Company Dollar until they Cap again.

In Cap Management, the OP, TL, and MCA first plot out on the Cap Management Report which months the existing capping agents in the Market Center Cap reset dates occur. It's hard to predict when Capping agents will actually cap, so in Cap Management we just assume that the resetting Cappers will cap in one month for the calculation; in reality the law of averages will apply and actual times of capping among your Cappers will overlap to average out.

What we are looking for is enough resetting Cappers in a given month that their Company Dollar could cover the monthly expenses. So if you divide your monthly expenses by the Cap amount, that is how many agents you would need to have their Cap reset date occur in that month. In our example:

Market Center expenses = \$43,000 per month

Cap = \$18,000

$\$43,000 \text{ in expenses} \div \$18,000 \text{ Cap} = 3 \text{ Cappers}$
needed who have their reset date in that month.

When you look at your calendar of Cap reset dates for your Cappers, you may have months where you do not have Cappers resetting. This is your opportunity to find new Cappers and plug those holes to ensure those months are profitable. You would prefer to find agents who are ready to join in that month and begin paying right away. But if you have an agent ready to join in a highly profitable month, you may arrange it so that they begin paying Company Dollar to their Cap in the month you need.

Positioning Cap Management to Agents

This is a win-win for the Market Center and the agent. The Market Center gets a cap where it needs one, and the agent gets to keep the Company Dollar for a time period after they join. From then on out, that month will be the date their Cap resets, instead of their anniversary date. Use this easy script when recruiting:

Script

“We believe in win-win. I’d like to explore this with you. We’re winning if you join our Market Center, and I want to show you how you could win.

We’re in August. If you could come over by the end of next month, you wouldn’t have to pay any Company Dollar until November. You’d be at 100 percent, except for Royalty, until November 1. It could help you make the transition, and it would help the Market Center add Company Dollar to a month in which we need it for our business.”

Stay on Track with Guardrails

It is important to follow a few vital “guardrails” that we can never violate to make sure we don’t go off track:

- 1.** The anniversary date will not move—that will always be the date they joined Keller Williams Realty and it does not change.
- 2.** Existing Keller Williams Cappers are not moved around; Cap Management applies only to new capping agents.
- 3.** Agents continue to pay toward their Franchise Royalty Cap from the moment they join.
- 4.** The agent’s Cap start date is only moved with OP approval and the length approved by the OP.

Cap Management Is Never Complete

Cap Management is not a “set it and forget it” kind of tool—it requires year-round monitoring.

- Make sure you are keeping track weekly of when your Cappers are actually capping, because they may be capping sooner than you think!
- Add new Cappers to months you had previously cap managed if you have Cappers who leave or have an “off” year in terms of their production.
- Keep a constant vigil over your expenses: if expenses go up, your Cap Management strategy will need to adjust accordingly.

Winterizing Your Market Center

Production is slow in most markets at certain predictable times of the year. These can be slow months for both agents and the office. Even capping agents can have slow months during this time. Because of this, it’s good to have more Cappers than you might actually need to make sure that your Market Center is covered no matter the market condition. We call this “winterizing your Market Center.” What is a good rule of thumb?—Adding two more Cappers in those seasonally slow months.

Another important element of Cap Management is the awareness it gives you of your existing Cappers’ Cap reset dates. This can greatly help your retention. If a Capper leaves a Market Center, they are more likely to leave at their anniversary date when they begin paying Company Dollar again. By tracking their Cap reset dates, the Team Leader can then make sure that they are in communication and demonstrate the value of the Market Center for these existing Cappers.

Cap
Mgmt



Pipeline

Cap Management and the Pipeline Tool

In determining when you will add recruits to your Cap Management strategy, remember that whatever activities we take now will impact us 90 days from now. So as we look at Cap Management, the recruits we're talking to today are really going to fill the gaps in our Cap Management after 90 days from now.

Because of that, you can use the Pipeline tool as a tracking tool to make sure you are on track for your Cap Management. If you don't have the number of Cappers at the appropriate level in your pipeline for 30, 60, and 90 days, then you won't be able to fill the gaps in your Cap Management strategy for those months.

One easy way to jump recruits ahead on the Pipeline tool is to drive Cappers to Mega Camp! (One Growth Initiative member tracked his numbers and had an 85 percent conversion rate for recruits joining Keller Williams Realty if they go to Mega Camp). Imagine what having recruits ready to join in September would do for your ability to add Cappers in the slower months at the end and beginning of the year!

In addition to sharing this with your Market Center leadership, agents, and recruits, one great idea is to talk about this at every investor meeting to:

1. Predict what your profit is going to be
2. Have everyone speaking the same language
3. Enlist their help in hitting the goals

Communicating this to everyone allows you to walk your talk of profitability in your offices!

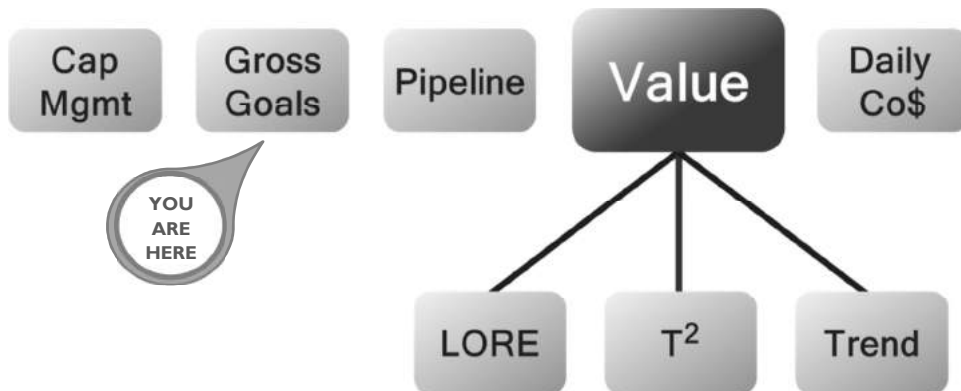
Cap Management Tool (Sample)

Cap Management for MC# EXAMPLE Full Cappers by Anniversary Month													
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
Cap Management Cappers = Expenses	Fry	Federer	Hellmann	Gottlieb	Peirce	Keefer	Aranda	Bullock	Dewitt	Deskin	Stone	Peterson	22
	Gillespie	Preston	2	Bennett	4	Love	Johnson	Block	Hyde	Allen	Lacks	Phillips	
	Winterize your Market Center	Wagner	Franklin	3			Otto			MacDonald	Dill	1	Merrifield
		Wright											
			Isaac										
CURRENT TOTAL	3	5	1	2	1	3	2	2	3	3	2	3	30
GOAL	3	3	3	2	2	2	2	2	3	3	3	3	31
# Needed to reach the Goal	0	(2)	2	0	1	(1)	0	0	0	0	1	0	4
CAP MANAGEMENT REPORT INSTRUCTIONS:													
1. Fill in the last names of your current cappers in their anniversary month.													
2. Fill in your capper Goals. How many cappers do you need each month to cover expenses? Example \$20,000 cap and \$36,000 monthly expenses = 2 cappers needed each month. Insert rows if your market center needs more than 2 each month to cover expenses.													
3. Seasonality works for you in April - August. Add an extra yellow capper box in the remaining months to Winterize your market center. Add these numbers to the Goal row.													
4. Number the empty yellow boxes with the priority order you need cappers in your market center.													
5. Once your Cap Management is filled, add 1 additional capper in each month (and that's when the fun really begins!).													
Note: Moving an existing capper to a new month is never recommended! Fill in your Cap Management with new cappers!													

Notes

Gross Goals

Where are we? Gross Goals is the second of the Growth Initiative lead generation tools.



Overview

Gross Goals is a monthly goal setting and vision tool that calculates the recruits the Market Center needs to grow and ensure profitability. This tool benefits Market Center leadership by allowing them to:

- **Keep focused** on the necessary gross recruiting goals
- **Overcome** the backsliding force of attrition
- **Set the Market Center up for profitability**

Implement Gross Goals!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement Gross Goals.

What Is Gross Goals?

Gross Goals is a simple step-by-step spreadsheet that walks you through the process of determining your adjusted gross recruiting goals. The worksheet helps you calculate:

1. Current agent count
2. Monthly breakeven recruits (agents you can expect to lose in a given month)
3. Monthly net agent goal (agents you need to grow by each month above breakeven)
4. Monthly total gross (monthly breakeven recruits plus monthly net agent goal)
5. Adjusted monthly total gross (factoring in your actual performance year-to-date)

Remember, your gross goal is about cash flow; your net recruiting number is about profitability. By bringing in more agents, you are creating the opportunity for bigger gross revenue. But it's the number of agents you actually keep that will ultimately define your profitability. The two are linked: you can't have positive growth without gross. If we are being real, you can't even maintain where you are now without gross.

Unfortunately, your Market Center will experience attrition; agents leave for a variety of reasons. Steve Murray with *REAL Trends* tells us the U.S. industry attrition rate is 30 percent. What this tells us is that we need to factor this attrition rate into our gross goals to make sure that our Gross Goal is realistic. Once you have factored for the attrition that exists in your gross numbers, you can then work on the value you add to those agents to make sure your net improves. It starts with gross.

How Do We Use Gross Goals?

This is a tool that the OP, TL, and MCA will update each month so that they can understand performance and how it's affecting the goal. The template is easy to use and does the calculations for you if you simply update the appropriate numbers in yellow each month.

Here are some quick definitions to help in filling out the worksheet:

- **Market Center Agent Count**—Agent count at beginning of the year (this doesn't change month to month; once it's been filled in at the beginning of the year, leave that number in place)
- **End of Year Net Agent Goal**—Number of agents you want to grow by (e.g., Total End of Year Agent Count *minus* Beginning of Year Agent Count)
- **YTD Net Agents**—Number of agents you've added (Current Total Agent Count *minus* Beginning of Year Agent Count)

Each month, the “New Adjusted Gross Monthly Recruiting Goal” will tell you what your gross recruiting goal is for the next month. If you are behind on your numbers, your adjusted goal goes up and you will notice the box also turns red; if you are on track, the number will remain the same or go down and the box will turn green. If you are on track and hitting your goals, it gives Market Center leadership the opportunity each month to consider whether it's time to raise the goal.

Focus on the Activities

Truth: Never focus energy on the result; focus on the activities that cause the result!

When you update your Gross Goals worksheet, if a TL ever gets behind in their gross goals, there's a risk that the *New Adjusted* goal could start to feel insurmountable and discouraging to the TL. But we can't focus on that. To bring about change, we've got to focus on the activities that are not happening that create the challenge. What you are likely to find in this situation is that the TL is simply not *Doing the Two* (two recruiting appointments each day). So instead of focusing on the *New Adjusted* goal, make sure the TL and the Market Center staff are all focused on the TL *Doing the Two*! By *Doing the Two*, the TL will naturally get back on track toward the goal.

Remember, we track these things not to beat anyone up over missed goals. As John Davis stresses, “There is no stick in the Growth Initiative; there is only sugar.” So instead of blindsiding the TL with what they did wrong, we are letting the numbers do the heavy lifting to point out what's not happening and what we need to go do about it.

And this accountability to the activities that drive the results for the gross goals is huge. Look at your Company Dollar per agent. For every gross recruit you bring into the business, you are adding that much new revenue on average to your business (by the way, for every agent that leaves, you are losing that much revenue). Now, compare your Company Dollar per agent to your Cap and that is the potential room for improvement you have! So when you look at your Gross Goals worksheet, think about it in terms of Company Dollar. If your Cap is \$20,000, then for every gross goal you hit each month, multiply that number by \$20,000 and potentially, that is the opportunity for monthly gain in Company Dollar for your Market Center! And everyone benefits from that gain:

- Market Center investors gain profit.
- TLs and MCAs achieve their financial goals and get the positive energy and momentum.
- Agents in the Market Center get energized by the growth and have greater opportunities for cross-sales, Profit Share, and Growth Share.

Explaining the benefits to everyone in the Market Center then gives you a platform to be able to share your gross goals with the investors, staff, ALC, and agents. If they know the goals and the benefit, you are increasing their synergy with the Market Center in hitting those goals and increasing everyone's energy when you do hit them!

Tying It All Together

Truth: The Growth Initiative tools work together as one thought process to grow your Market Center!

Once we understand the goal for gross, then we can factor in our Cap Management tool to figure out how many of those gross recruits need to be Cappers, and we can look at your Pipeline tool to see what activities need to happen for you to stay on track to hit both your gross and Capper numbers.

The Pipeline tool will correlate to the Gross Goal number. For example, if the Gross Goal is 10, then the Pipeline should reflect that we have a minimum 10–12 per month scheduled to join us (i.e., 10–12 “10s,” 10–12 “9s,” 10–12 “8s,” etc.). Now, if we have fallout (and we do), by having more than 10 at each level, we will still hit our goal. In that respect, this Gross Goal becomes a minimum standard for the Pipeline tool. And inside that standard is your standard of productivity required by your Cap Management strategy (e.g., 2 Cappers, 2 Half-Cappers, etc.). As you grow the number of productive agents in your Market Center, you will naturally see the increase show up in Training Tracking and LORE, which you can then share to drive more recruiting. This is the virtuous circle of growth!

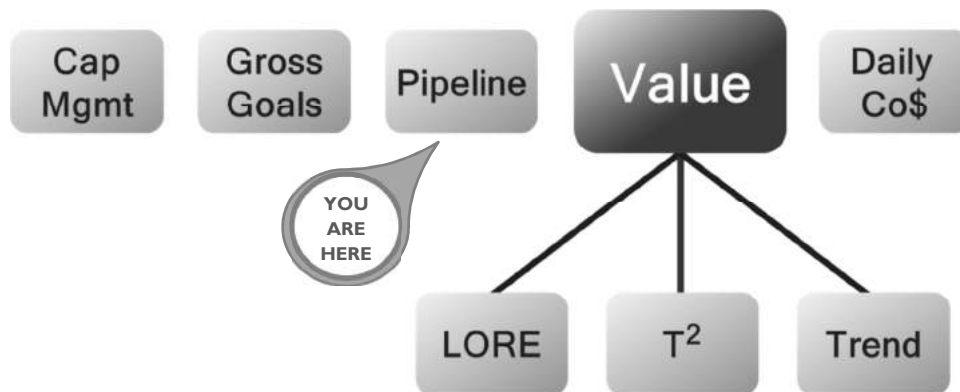
Gross Goals Worksheet (Sample)

2014 Market Center Gross Goals			
Enter data in the yellow highlighted cells			
DATE:	July 1, 2014	# Months Remaining	6
MARKET CENTER:	EXAMPLE		
ATTRITION CALCULATION (based on full year)			
MC Agent Count:	140	← Insert your December 2013 agent count HERE	
Attrition 30%:	42		
42	Attrition loss ÷ 12 =	4	(rounded up)
4	Minimum Gross per month just to stay even		
NET AGENT CALCULATION (based on full year)			
60	End of Year Net Agent Goal	← Insert your Net Agent Goal HERE	
60	End of Year Net Agent Goal ÷ 12 =	5	(rounded up)
5	Minimum net per month to stay on track for your end of year goal		
9	Your Gross recruiting per month required to GROW! <i>(Not to stay even, but to GROW!!!)</i>		
<i>(Use this section to track progress from February-December)</i>			
ADJUSTED MONTHLY RECRUITING GOALS			
21	YTD NET AGENTS	← Insert your YTD Net Agent Count HERE	
39	Net balance to achieve your year end goal		
	6	# of months left for recruiting	
7	Adjusted monthly net recruiting goal		
5	Adjusted monthly attrition rate		
12	NEW ADJUSTED Gross monthly Recruiting Goal <i>(Cell turns green if you are on track for End of Year Net Agent Goal - turns red if you are behind)</i>		

Notes

Pipeline Tool

Where are we? The Pipeline tool is the third of the Growth Initiative lead generation tools.



Overview

The Pipeline tool is a weekly report that allows Market Center leadership to see a list of potential recruits for the office and gives them a measurement of how soon they can expect those recruits to join. This benefits:

- **The OP** when coaching their Team Leader to the goals they've set together
- **The Team Leader** when focusing each day on who they need to contact and what needs to be done on an individual basis to move recruits through the recruiting pipeline
- **The MCA** when ensuring a smooth transition for the agents

Implement the Pipeline Tool!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement the Pipeline tool.

What is the Pipeline tool?

The Gross Goals worksheet tells us what we need to stay on track to grow; it is a global tool. Cap Management is a drill-down tool that focuses on how many of those gross agents need to be Cappers. It's not quality or quantity: it's both. With our Gross Goals and Cap Management strategy in place, then we can drill down into the Pipeline tool to see if we've got the people in our recruiting pipeline to make those goals happen.

Think of the Pipeline tool as the *evidence of appointments*. With the concept of "accountability," we know that instead of holding our people accountable to results, it's far more productive to hold them accountable to the activities. In recruiting, appointments are the activities! In that respect, the Pipeline tool allows for positive accountability for the TL and OP to the activities that drive recruiting to hit their goals.

Look at your Market Center's financial trends year-over-year and look 90 days out. Can you use more owner profit in those upcoming months? We know Cap Management can eliminate seasonality, but only if you have people joining you in those months.

Question: How could you know who will join your Market Center 30, 60, 90 days from now?

While there is no crystal ball that allows you to see the future, the Pipeline tool is the closest thing to it. The Pipeline tool is a simple list of the recruits the TL has had an appointment with, any notes that are important about the recruit, and a numeric ranking showing when they are likely to join the Market Center:

The 7s and above on your Pipeline tool represent your opportunities to hit your Gross Goals and Cap Management goals.

10 = Coming this month

9 = 30 days out

8 = 60 days out

7 = 90 days out

6 = Good meeting

5 or less = Appointment

How do we use the Pipeline tool?

It's a simple equation. If our Gross Goals worksheet says we need X gross agents per month, we can see if our Pipeline tool gives us X gross each month for the next 90 days:

- Do I have X number of agents that are 10s for this month?
- Do I have X number of agents that are 9s for next month?
... And so on 90 days out

And whatever your Cap Management goals are for the next 30, 60, and 90 days, you will also need to see that many Cappers on the Pipeline tool at the appropriate level.

The Pipeline tool can bring great clarity to your recruiting efforts. If you have the gross and Capper recruits you need in your pipeline to hit your goals, awesome, you're doing it! Now, maybe it's time to think about raising those goals! And if you don't have the people you need in your pipeline, the great thing is that now we know that we need to:

- Add leads to our pipeline
- Work on moving the existing leads along the pipeline (i.e., from 6s to 7s; 7s to 8s; 8s to 9s; and 9s to 10s)

Updating and understanding what this Pipeline tool is telling us is a daily habit for the Team Leader. If the TL is scrambling to get the report ready just because the meeting with the OP is coming up, they will miss the focus that this tool can bring to their daily activities. The very best TLs make it a point to start the day with this report so they stay on track!

Leverage

The Pipeline tool can create leverage if you are implementing the tool with the whole Market Center staff, because it creates a system of follow-up that is not dependent on the Team Leader.

Think about it like this: what's the difference between adding 5 agents per month and 15 agents per month? The answer is the systems that support the transition of those agents into the Market Center. Remember, productive agents typically join after the end of the month because they are closing out listings at their former company. Without great systems, having all those recruits join at once (especially since the beginning of the month is transmittal) can create havoc for the office staff and negative feeling about the Market Center from the new recruits.

Question: What is your system for onboarding agents and how many recruits would it support in a way we would be proud to have new recruits go through it?

To grow your system to be able to support massive growth, the Team Leader can use the Pipeline tool to help the MCA understand who's coming down the pipe and when. If the Team Leader properly empowers the MCA, they can easily create a great system to take care of these incoming agents.

When the Team Leader and MCA both understand who on the Pipeline Report is a 7 or above, this allows MCAs to build a solid 90-day plan for onboarding those agents. For any 9s and 10s, the MCAs can call those agents and walk them through the transition plan to set expectations and give those agents "white glove" support. As agents actually join the office, MCAs should have initial weekly calls for the incoming agents to make sure they are getting questions answered, and once the agent is up and running, the MCA can taper off the calls.

Once the system is in place, having a successful handoff from the TL to the MCA for onboarding is simply a matter of making sure that the recruit doesn't feel abandoned by the TL in the transition handoff. That's done by having the TL set expectations with the agents that the MCA "... Is amazing and the best person to make sure your transition is smooth and get you up and running with us ..." Ongoing, the MCA will communicate any issues or challenges they are seeing with any particular incoming agents to the TL, so the TL can help when needed.

By working the Pipeline tool to create this teamwork, it can change the energy in your Market Centers:

1. The TL is spending less time on the details of onboarding agents. This means happy Team Leaders!
2. The TL is focusing on recruiting and hitting their goals at higher and higher levels. This creates profit and Profit Share in the Market Center. This means happy owners, agents, and Market Center staff!
3. The incoming agents are getting the proper attention from the people who will follow through on the details. This means happy recruits!

Consulting to the Tool

When dialoguing about the recruits on the list, the tool provides clarity and keeps the focus on evidence (numbers) and activities, rather than emotions.

Powerful questions to ask during the consultation:

- This person was an 8 last week; are they still an 8 this week? Why do we think that?
- How could we create urgency in this person who is an 8 (or 7 or 6) to get them over sooner?
- Given the notes/hot buttons, what's going on with the person and what is the best next step the TL should focus on?
- Are any of the 9s or 10s at risk? Why and how can we address that?
- Is there someone on this list that isn't coming that we need to remove?
- Is everyone on the list on an appropriate marketing and action plan?

***Truth: The Growth Initiative tools are never punitive;
they are always supportive.***

Remember, there is no stick in the Growth Initiative; only sugar! The Pipeline tool is not a micromanagement tool, and it shouldn't be used as one. It's designed to allow Market Center leadership to talk about the real challenges (objections, contingencies, etc.) the TL is facing in getting recruits into the Market Center, and how the OP and MCA can help them overcome those challenges. Together everyone achieves more!

Pipeline Tool (Sample)

Pipeline Tool

Date: March 19, 2014

C=Capper, N=New, H=Half Cap, Q=Quarter E=Less than Quarter

Run Sort by Rating

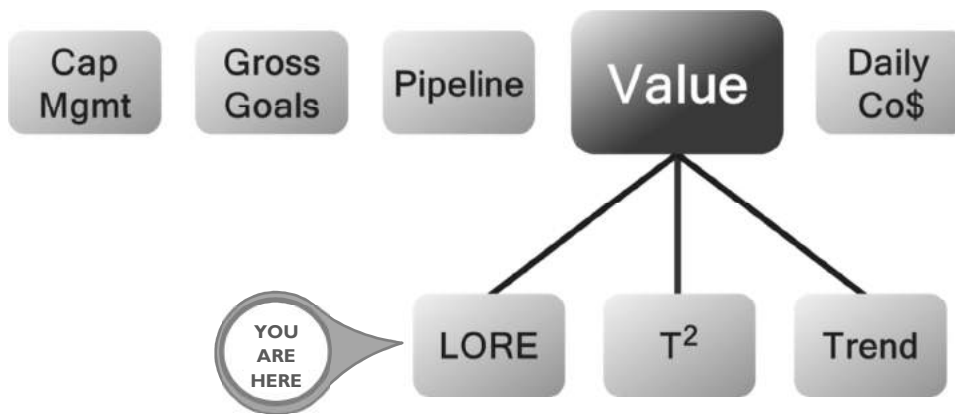
#	Name	Notes	Next Step	Date of 1st Appointment	Cap	Rating	When They'll Join By
1	Amy	prior development spec.	check back april 2014	Sept	H/C	10	
2	Clayton	w/independent uptown-going out of town	follow up-revisit goals	6-Feb	H	10	
3	Erin	Roger referral	signing	April	N	10	May
4	Jeff	working w/clients	signing	May	Q	10	May
5	Patricia	Debbie referral	signing	May	Q	10	May
6	Steve	new	signing	April	N	10	May
7	Tammy	licensed-from Carol	signing	May	N	10	May
8	William	new licensed from Allison	signing	May	N	10	May
9	Ann	6 million producer	set up meeting for transition	April	C	9	May
10	David	Capper - do more for kids	get to come in!	Sept	C	9	May/June
11	Eric	Bill's friend	needs to pass state exam	Feb	N	9	May
12	Jamie	New - Sharp - Husband is licensed	follow up	Feb	N	9	May
13	Karen	lives in adjacent county - has been licensed	Keep in touch	Jan	H	9	April/May
14	Norma	been in business 28 years	mtg March 14th	July	H	9	
15	Mark	referral from Bob	check in - May	March	N	9	
16	Paula	referral from Sally	check in - May	March	Q	9	May
17	Richard	Bridgette's hubby	in prelicense - will join here	April	N	9	June
18	Sean	Jordan referral	follow up May	April	H	9	May
19	Scott	Nicki's mom/showcase	follow up May	April	Q	9	May
20	Tamara	Jenny's referral	in prelicense - will join here	April	N	9	May/June
21	Tim	Lori's referral		April	N	9	May
22	Vicki	prelicense		April	N	9	May
23	Anne	5-7 million	get info for transition	April	C	8	May/June
24	Cindy	in prelicense - super sharp	shadowing agents now	Feb	N	8	May/June
25	Daril	5-6 million	get in loop for space - set up 1 on 1	April	C	8	May/June
26	Eric	Capper - cross sale	follow up in March	Feb	C	8	May/June
27	Greg	Helen - used to be Capper	contact now! March	Jan/Aug	H	8	May/June
28	Jessica	Showcase - Monica's mom	should sign in April	March	H	8	May
29	Linda	Riley referral - CB 3 years in bus	mtg again in March	April	H	8	May/June
30	Paul	Brian 7 million	will sign when a few others do	March	C	8	June
31	Susan	Fiona referral/not happy where she is	follow up May	April	C	8	May
32	Cynthia	11 million	keep planning	Jan	C	7	June/Aug
33	Ernest	referred by James	in school	March	N	7	June
34	Henry	interested in bus ctr closed 14 mil last 10	follow up w/update May	Feb	C	7	
35	Lori	referred by Kathy - was in RE in other	in prelicense - will join here	Jan	N	7	April/May
36	Mary	SHARP - friend of Erin	waiting for after summer	June	N	7	
37	Mitch	TV news person	mtg 7/8 to create plan	March	N	7	June

Total # of "10" appointments (joining this month)	8
Total # of "9" appointments (joining next month)	14
Total # of "8" appointments (joining in 2 months)	9
Total # of "7" appointments (joining in 3 months)	8
Total # of "6" appointments (good meeting)	2
Total # of "5 or less" appointments	0
Total appointments	41

Notes

Language of Real Estate

Where are we? LORE is the first of the Growth Initiative value tools.



Overview

LORE is a communication tool that presents our value. It is a monthly report created at the Market Center that allows the Market Center leadership to highlight the Market Center's improvement in eight key goal categories. Benefits to the Market Center include:

- **An appointment setting and conversion tool** that provides evidence that the Keller Williams value proposition will help a recruit grow their business.
- **A focus tool** that points out where the Market Center is weak and should focus its training efforts.

Implement the Language of Real Estate!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement the Language of Real Estate.

What is the LORE?

The Language of Real Estate is a monthly report that shows how your Market Center is doing for eight key numbers in our industry:

- 1.** Closed Units
- 2.** Closed Sales Volume
- 3.** Listings Taken
- 4.** Listings Taken Volume
- 5.** Listings Sold
- 6.** Listings Sold Volume
- 7.** Contracts Written
- 8.** Contracts Written Volume

The tool itself is a simple spreadsheet prepared monthly by the Market Center leadership that allows you to quickly calculate the percentage improvement for your Market Center for all eight categories month to month. If you don't have an easily accessible central source for market data, look at third party portals, talk to friendly local brokers, and use other sources to find out what's going on in the market. You can also compare how your Market Center results for these eight numbers compare to your Region's numbers, Keller Williams Realty's numbers, or just use your Market Center numbers by themselves.

How do we use LORE?

The LORE tool gives you a comparison that will tell us two distinct stories that we can use to grow our Market Center:

1. **The Value** – the story we can share externally about the successes our agents are experiencing
2. **The Opportunity** – the story about how we can improve the successes our agents are experiencing

The goal is to communicate both stories properly with all appropriate audiences, so that your value story will attract top agents, and your opportunity story will unite the Market Center to create an even BIGGER value story in the future.

Evidence of Benefit

Remember, to increase net, you must create and communicate value. With the information from LORE in hand, you have a system to be able to tell the value story of your Keller Williams Market Center's value proposition in a more powerful way.

Truth: Top producers speak a different language from other agents: it's the language of numbers.

LORE gives you a system that immediately makes the Team Leader credible in the eyes of top agents because now Team Leaders can speak the same language as the top producers in a powerful way.

Top producers are competitive and want to win, so they will be very interested to hear what you can do for their numbers. For a top producer, there are two ways that joining a new company could increase their bottom-line: 1) they can get a better split than they currently have; or 2) their new company can help them grow their productivity.

Although we have a great compensation structure, we don't compete on commission splits. So you won't be the cheapest deal in town—and you shouldn't try to be! While some brokers will foolishly put themselves out of business competing on splits, Keller Williams gives you a vehicle to compete on the value we bring in building an associate's business. And LORE gives you the evidence of that value proposition that you can recruit to. It also puts your compensation structure in the context of the value you provide them in helping them build their business.

LORE in Recruiting

Just as we tell real estate agents to be the local real estate economist of choice for their customers, your Market Center can become the real estate expert for agents in the market. When agents hear you speak this language and see the demonstrated proof that what you are doing in your Market Center is increasing these numbers, your Market Center will be seen as a credible home for top producers and your Market Center will become the real estate economist of choice for agents.

Truth: LORE is about creating curiosity.

LORE creates a different narrative. Where our competitors will try to paint your Market Center as a “cult” or new agent training school, LORE presents overwhelming evidence that we are a culture of abundant production. When you are speaking LORE to a potential recruit, they are inspired to ask these two questions:

1. What are you doing in your Market Center that is leading to such dramatically different results for your agents?
2. How can I be a part of it!

Quality and Quantity

Recruiting is not just about quantity or quality of recruits—it’s both! And the quality will show up in the quantity, if we are purposeful about going after Cappers. LORE goes hand-in-hand with Cap Management because in order to recruit Cappers, we have to set appointments with Cappers. In order to set appointments with Cappers, we have to call Cappers. And in order to call Cappers, we want to have something powerful to share so we can come from contribution.

Think of it like this: if a top businessperson in your market called and said they would like to speak with you, you would take the meeting because you know it could lead to opportunities for you. By using LORE, you can demonstrate that meeting with you is of value to a top-producing agent and could lead to bigger opportunities for them.

While not all recruits will join after your first recruiting appointment with them, LORE gives you a reason to talk with top talent each month because top talent never gets tired of hearing what’s succeeding in the market.

LORE



Cap
Mgmt

Tell Everyone

LORE allows you to highlight what is going well in the Market Center, but not all of your numbers matter and not all of them will be bright spots for your Market Center. In your recruiting, focus on the positive numbers and build a compelling story around them. Once you do, get the word out everywhere:

- On recruiting calls
- In recruiting appointments
- On social media sites
- On a wall in your Market Center (training room, TL's office, etc.)
- At Market Center sales meetings
- At Market Center staff meetings
- At Market Center investor meetings

Use LORE on your recruiting calls to demonstrate that a meeting with you is worth their time. And once you set an appointment, LORE becomes a great conversion tool to once again provide proof that Keller Williams could help them.

***Truth: By focusing on the top agents and using LORE,
you will automatically attract other Cappers/agents!***

Top agents talk with other top agents. By sharing what's going on in your Market Center with top-producing agents, they will share that narrative with others and spread the word about your office. It's a tool that provides great leverage for growth!

LORE in Your Market Center

LORE will work its way into many aspects of your Market Center's day-to-day business. LORE helps:

- ✓ The Team Leader with their confidence in the value they bring to any agent, which means they will make the calls and set the appointments.
- ✓ Create curiosity in the minds of recruits when you present the evidence; this leads them to agree to the appointment and join.
- ✓ Market Center leaders truly understand their business, especially in the context of the market.
- ✓ Your Market Center investors understand the health of the business and how they can help the Market Center leaders.
- ✓ Your agents' local sales business because it gives them the opportunity to become what Gary Keller calls the local real estate economist of choice and convince buyers and sellers that they are the experts to work with.
- ✓ Your Director of First Impressions delivers a better script. Before LORE a Director of First Impressions might answer the phone, "It's a great day at Keller Williams. How may I help you?" But with LORE, now they can say something like, "It's a great day at Keller Williams. We're outpacing the market by 50 percent in listings taken. How may I help you?" This is a powerful message for outside agents and customers to hear when they call.
- ✓ Your Market Center training by giving you a snapshot of what your upcoming training calendar should focus on. If you are weak in certain areas (e.g., listings taken), you now know that you need to focus on that in your training (e.g., Win with Sellers).
- ✓ Your Market Center leadership retention because the more we get people engaged in our Keller Williams tools, the more likely they are to stay with us. *The Millionaire Real Estate Agent* is one such Keller Williams tool for agents; they won't have that anywhere else. The Growth Initiative is a great retention piece for talented Market Center leaders. It gives us a common language and gives us the tools we need to be highly successful at what we do. And both of these create positive magnets that attract and keep top talent on our Market Center teams.

Recruiting with the Language of Real Estate

Step 1: Find the Month over Month Change from your MLS or Board of Realtors

Formula	Original Amount	New Amount	Find the Change. Subtract the New Amount from the Original Amount	Find the % Difference. Divide the Change by the Original Amount. Multiply by 100.
	Total Last Month	Total This Month	Change = New Amount – Original Amount	Change/ Original Amount * 100
Example 1	250	265	15	$15/250 = .06$.06 * 100 = 6%
Example 2	300	265	-35	$-35/300 = -0.12$ $-0.12 * 100 = -12\%$
Closed Units	250	265	15	6
Closed Sales Volume	300,000	250,000	-50,000	-17
Listings Taken	300	310	10	3
Listings Taken Volume	250,000	300,000	50,000	20
Listings Sold	100	150	50	50
Listings Sold Volume	1,000,000	2,000,000	1,000,000	100
Contracts Written	25	75	50	200
Contracts Written Volume	600,000	612,000	12,000	2

Note: Replace the numbers in red with your board's numbers.
(These numbers are just place holders)

Step 2: Find the Month over Month Change from your Multi-Year Trend Report

Find your Market Center's Multi-Year Trend report on mykw.kw.com. Click Reports, then Market Center.

Formula	Original Amount	New Amount	Find the Change. Subtract the New Amount from the Original Amount	Find the % Difference. Divide the Change by the Original Amount. Multiply by 100.
	Total Last Month	Total This Month	Change = New Amount – Original Amount	Change/ Original Amount * 100
Example 1	250	265	15	$15/250 = .06$ $.06 * 100 = 6\%$
Example 2	300	265	-35	$-35/300 = -0.12$ $-0.12 * 100 = -12\%$
Closed Units	250	275	25	10
Closed Sales Volume	300,000	260,000	-40,000	-13
Listings Taken	300	325	25	8
Listings Taken Volume	250,000	275,000	25,000	10
Listings Sold	100	130	30	30
Listings Sold Volume	1,000,000	1,500,000	500,000	50
Contracts Written	25	100	75	300
Contracts Written Volume	600,000	635,000	35,000	6

Note: Replace the numbers in red with your Market Center's numbers for last month and this month.
(These numbers are just place holders)

Step 3: Find the Difference Between Your Board and Your Market Center

Item	% Difference for Your Board	% Difference for Your Market Center	How Your Market Center Compares
Closed Units	6	10	4
Closed Sales Volume	-17	-13	3
Listings Taken	3	8	5
Listings Taken Volume	20	10	-10
Listings Sold	50	30	-20
Listings Sold Volume	100	50	-50
Contracts Written	200	300	100
Contracts Written Volume	2	6	4

Note: These numbers will autocalculate based on your entries.

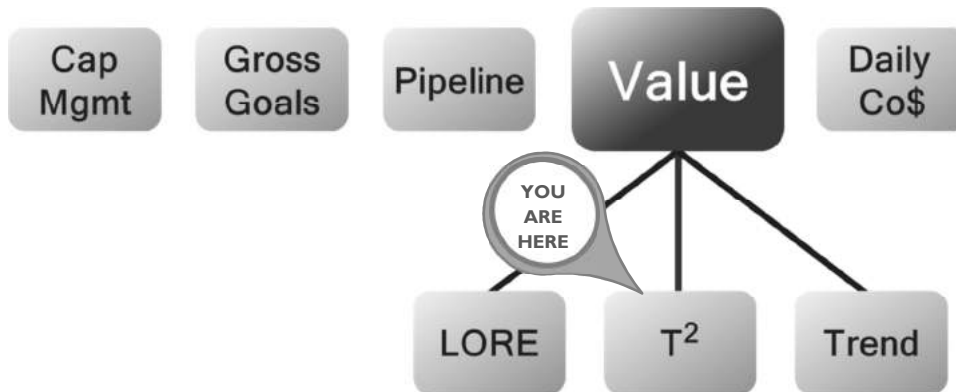
Language of Real Estate – Step 4 (Sample)

Step 4: Develop Your Talking Points

1	
2	
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9	
10	

Training Tracking

Where are we? T² is the second of the Growth Initiative value tools.



Overview

T² is a tracking tool meant to help communicate the value of your Market Center's training. It allows the Market Center to compare productivity to training attendance to show how much agents who attend training increase their production. When agents can hear exactly how training has helped with other agents' production and their business, the Market Center has the following benefits:

- **A standards and expectations setting tool** about the training your agents will attend both as they join and ongoing in their careers;
- **An attendance booster** for your training to further increase production for more and more of your agents;
- **A recruiting tool** to provide evidence of benefit for our training; and
- **A retention tool** for agents who understand the value Keller Williams has provided their business.

Implement the Training Tracking!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement Training Tracking.

What is T²?

T² validates and builds our value proposition. It is a simple spreadsheet that the Market Center will use to track who has attended training and then compare the productivity of those training agents to the agents that haven't gone to training.

Like LORE, T² will tell us two distinct stories that we can use to grow our Market Center:

1. **The Value** – the story we can share externally about the successes our agents are experiencing
2. **The Opportunity** – the story about how we can improve the successes our agents are experiencing

The goal is to communicate both stories properly with all appropriate audiences, so that your value story will attract top agents, and your opportunity story will unite the Market Center to create an even BIGGER value story in the future.

How do we use T²?

Implementing training tracking is a simple five-step process.



Implement Training

Truth: It's not "build it and they will come," but rather "provide and prove value, and they will come."

Many Market Centers struggle with the challenge of too few agents attending their training. Usually this boils down to one of three issues:

1. The training being offered doesn't show value;
2. Agents don't see the value; or
3. Both!

Communicating an awesome training calendar is definitely the easier of the two challenges. But first it has to be valuable and dollar-productive. Not having a world-class training calendar can be a combination of several factors. For instance, is the calendar offering training at all levels such that we are inspiring the top level of agents and providing them value? Or is the training addressing the specific needs in the Market Center?

How can we fix this? Look at your training calendar and consider two things with your Market Center leadership, investors, and ALC:

1. How is our current training calendar driving (or not driving) the results we are (or are not) currently experiencing?
2. If we want a more effective training that drives better results, what are we going to do differently?

Implementing a more effective training calendar is not about having 9,000 classes in your Market Center each month. It's about the effectiveness of the training you do have.

To construct your training calendar in a simple yet purposeful way, make sure that each month your Market Center calendar includes the following:

- ✓ One major Keller Williams training event each week
- ✓ An Ignite session every single day (follow the course format!)
- ✓ Dynamic, eventful team meeting each month with a powerful training moment
- ✓ An ALC meeting each month with a training component for top producers—this brings people into the ALC meeting because they want to learn what the top people are learning

To be purposeful about the training you have, aim it at your Market Center's challenges. Look at your LORE tool and Trend tool. Any weaknesses you have today (e.g., low listings taken or contracts written) are going to show up 30, 60, and 90 days from now in terms of Market Center and agents' closed production and profitability. Likewise, any changes you implement today won't show results for 90 days. So if the Market Center is light on listings taken in the current month, you know you need to focus your training efforts *now* on listings (e.g., Win with Sellers) to make sure that 90 days from now you see that trend go up. If you can proactively tie your training to where you are struggling, your training can help to turn the productivity roller coaster into a smooth, ongoing ascent.

Once your training calendar is set, it should be sent out no later than the 20th of the preceding month to allow your agents and recruits to make the training part of their calendar!

Take Attendance

Truth: Everybody wants to be counted!

Just by setting the expectation that your Market Center leadership cares enough to take attendance on who is showing up to the training, agents will start attending more. And by taking attendance, you can then see what results those people who are attending are seeing in their productivity. Done well, this is a good self-management tool for the agents to show up—it sets an expectation that everyone is expected in the training and the training actually delivers value.

As an example of just how dramatic the results can be, when the Arlington, Texas, Market Center began tracking their training, they saw that the 32 percent of their agents who were actually attending training were generating 70 percent of the GCI in the Market Center. When the Market Center leadership shared this with their agents at the sales meeting, it drove attendance to their training in a big way. And it wasn't just the new agents that began coming; their results actually prompted one of the biggest top producers in the Market Center (who wasn't in the training group) to immediately begin attending the training.

For T² attendance, we are only looking at KWU training and events (not industry training offered to our agents). The goal is to demonstrate the value of being with Keller Williams, so instead of tracking training they could get anywhere, we want to focus our efforts to track:

- KWRI training (Mega Camp, Family Reunion, etc.)
- KW MAPS Coaching
- Keller Williams Regional KWU training
- Market Center KWU training (including Market Center team meeting and ALC meeting)

**Step
3**

Convert to a Spreadsheet

After every class, the MCA will make sure that the sign-up sheet is converted to a simple spreadsheet. Be accurate with your attendance taking! Mark a one (1) in the cell underneath the training class if the agent attended that class.

**Step
4**

Pull the Numbers

The MCA will take this spreadsheet and create the T² productivity comparison immediately on a monthly basis. It's important to start immediately tracking your training with this tool and do it each month! Don't wait until you've reengineered your calendar, etc. After 90 days, you will see a clear pattern emerging about how effective the training is, but some patterns will become apparent even sooner.

The pattern you are most interested in are what has happened between two specific groups of agents: 1) those who attended two training classes per month; and 2) those who didn't. These will be your two groups for comparison. With these two groups, you will then look at the GCI and/or closed units of the group that attended training versus the group that didn't attend training. What differences do you see in the numbers for each group? And what does that tell you about the success of the training agents versus those who don't train?

Communicate the Numbers

Once you've done the comparisons, instead of just communicating the numbers haphazardly, the goal is to be purposeful in how we communicate the *story* of the numbers. Each month the OP, TL, and MCA will have their after-transmittal meeting to go through the Growth Initiative tools, including the T². This is the leadership's opportunity to uncover the stories (value and opportunity) the numbers are telling them.

From there the Market Center leadership will take those stories to the staff in the staff meeting. After the staff understands the numbers and can communicate the stories, the Market Center leadership will take the value story to the agents in the Market Center through the ALC meetings and the team meetings. Once the agents in your Market Center are energized with this story, they will be excited to help the Market Center share those stories with non-Keller Williams agents through a variety of channels:

- Social media
- 33 Touches
- Recruiting calls
- Recruiting appointments
- And any other way you or your agents communicate with other agents!

The goal is to communicate the value story in a way that lets the numbers do the heavy lifting. This will point to an undeniable path for your agents to be more successful. As your agents choose to take this path, their successes will lead to a process of continual improvement of the evidence of the value you offer. The way to illuminate this path and to turn this report into a tool is to communicate the successes to everyone. This path will actually help to set a bar that all agents see as a possibility for achievement in your Market Center. This in turn becomes a standard that the TL can recruit to!

In the TL's recruiting conversations, T² allows you to have more powerful LORE conversations with top agents. It allows you to share both how the Market Center is outpacing the market (LORE) and why (T²). This gets recruits excited about coming into our training, which will allow them to experience how Keller Williams will help them first-hand. This makes the TL's job much easier. And T² is also a good retention tool for your MCA, because it allows you to see who is not engaging. This gives the MCA a guidepost as to who they need to focus on in their retention efforts.

Questions to Consider

Truth: It's a growth process.

Don't beat yourself up if your numbers aren't all awesome right from the start. As you demonstrate that you are providing real value, more and more people will come and your numbers will go up. And if you are experiencing low results, figure out why your training isn't leading to production and fix it.

In looking at how you can improve on your T² results, consider the following with your Market Center leadership, investors, and ALC:

1. Are classes growing (at a rate that is outpacing your Market Center agent count growth)? Why or why not?
2. What do our training attendance numbers this month (which are a lead indicator of our Market Center's future success!) tell us about the effectiveness of our training?
3. How effective is our messaging around training? Does it prove the value?
4. Is our training action based and does it give agents the steps and motivation to implement?
5. Are we focusing on new agent training or do we have training for all levels? (again, it's not about having lots and lots of training; just be purposeful about the variety!)
6. How does the training we offer highlight the benefit of being with Keller Williams? Are we teaching KWU training or are we leveraging too much industry training they could get anywhere?
7. Are our trainers living up to our standards of being both credible on the topic and a great trainer? (remember, just because an agent is good at something doesn't mean they are good trainers)
8. Are our trainers living up to our standards of teaching the materials, versus "teaching by war stories?"
9. Is our training aimed at the productivity challenges of the Market Center? (let LORE and Trend guide the way)

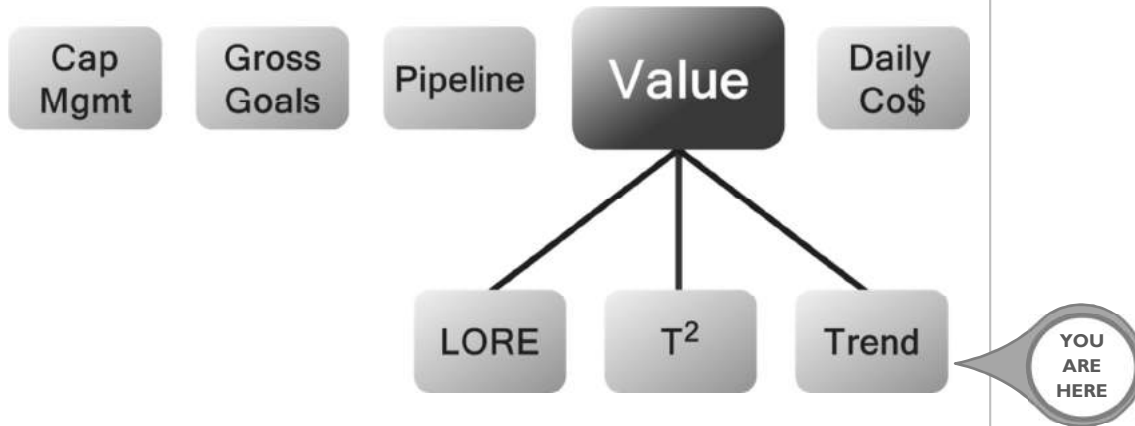
Training Tracking Spreadsheet (Sample)

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Notes

Trend

Where are we? The Trend tool is the final Growth Initiative value tool.



Overview

The Multi-Year Trends tool (“Trend”) is both a value and vision tool, allowing the Market Center to focus on:

- **The value** the Market Center has provided agents in the last 90 days
- **What** the next 90 days are going to look like for the agents and the Market Center
- **Where** the Market Center needs to focus now to improve those results for the agents and the Market Center in the next 90 days

Implement the Trend Tool!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement the Trend tool.

Trend



Cap
Mgmt

Gross
Goals

Pipeline

What Is the Trend tool?

The Multi-Year Trends tool (Trend) is a production report that tracks monthly performance for 41 metrics. Some of these metrics are report cards, telling us how the agents and our Market Center did over the last 90 days and in the context of past years' performance.

Some of these metrics are vision tools, in that they give you a glimpse into the future up to 90 days from now to see how your agents and your Market Center will be doing in the coming months. Combined with the Cap Management, Gross Goals worksheet, and Pipeline tool, this allows you to tie recruiting activities to performance.

Trend categories

1. Total Agent Count
2. Recruiting Appointments
3. Gross Agent Gain – how many agents joined the Market Center in the month
4. Net Agents – Gross Agent Gain minus any attrition during the month
5. Closed Units – listings and buyer sides
6. Closed Units per Agent
7. Closed Sales Volume – total dollar value (sales prices) of all Closed Units
8. Sales Volume per Agent – Closed Sales Volume divided by Total Agent Count
9. Listings Taken – number of listings not yet sold
10. Listings Taken Volume – total dollar value (list prices) of all Listings Taken
11. Listings Sold – number of listings sold in the production month
12. Listings Sold Volume – total dollar value (sales prices) of all Listings Sold
13. Contracts Written – number of buyer sides not yet sold
14. Contracts Written Volume – total dollar value (sales prices) of pending buyer sides
15. Closed GCI – Gross Commission Income before splits on all Closed Volume
16. GCI % of Closed Sales Volume
17. GCI per Closed Unit

Trend categories (cont.)

18. GCI per Agent
19. Average Sale Price
20. Paid on Volume (“POV”) – total dollar value (sales prices) only on transaction volume that the company receives company dollar on from uncapped agents.
21. POV % of Closed Sales Volume
22. POV per Agent
23. Company Dollar (“Co\$”)
24. Co\$ percentage of GCI
25. Co\$ per Unit
26. Co\$ per Agent
27. Approved Expenses
28. Expense % of GCI
29. Expense % of Co \$
30. Expense per Unit
31. Expense per Agent
32. Owner Profits
33. Profit % of GCI
34. Profit % of Co\$
35. Profit per Unit
36. Profit per Agent
37. Royalties
38. Royalties % of GCI
39. Royalties per Unit
40. Royalties per Agent
41. Profit Share

How Do We Use the Trend tool?

Each month, your MCA will pull the Trend tool and share with the OP and TL. As a Market Center leadership team, you are looking for the two stories that you can use to grow your Market Center:

1. **The Value** – the story we can share externally about the successes our agents are experiencing
2. **The Opportunity** – the story about how we can improve the successes our agents are experiencing

The goal is to communicate both stories properly with all appropriate audiences, so that your value story will attract top agents, and your opportunity story will unite the Market Center to create an even BIGGER value story in the future.

First Compare ...

As you look at your Trend, you will also want to compare your Market Center results to the numbers in your Region and for Keller Williams Realty as a whole. Due to the lag time for productivity as recruits join the company, especially with new agents, and due to the fact that Keller Williams is growing so rapidly, this means that there are some numbers (e.g., Closed Units per Agent) where your Market Center may naturally outpace the Region and Keller Williams at large!

When you can see that your Market Center is outpacing the Region's or even Keller Williams' system-wide numbers, you will want to share that message to provide evidence that your Market Center is something special! For your staff and existing agents, this validates what they are doing and gives them energy. For recruits, this creates curiosity about what you're doing that is working so well and gives them a tangible sense of what your Market Center offers them. Think about it like this: in cases where your numbers beat Keller Williams', your Market Center is outpacing the number one company in the world!

Now not all of your numbers will be better than the Region's or Keller Williams'. So when your Market Center is below Keller Williams, or the Region, you may choose to share their numbers, instead of your Market Center's, as evidence that our company is helping agents grow their businesses.

... Then Share!

Truth: We are transparent, so we bring everything—the good and the bad.

The TL will share these numbers with the staff at the staff meeting and the agents at the team meeting. At the team meeting, it's a best practice to have both the OP and the MCA attend so they can hear the aha's the agents are having about how this works hand-in-hand with the other Growth Initiative tools and how important their efforts are. If the staff is excited, they will have better relationships with the agents. And if the agents are excited, they will bring that energy into their businesses, which will lead to better and better results for them and the Market Center. This is delivering on your value to the agents.

The TL will present the numbers at the ALC meetings as well. As the ALC comes to understand this tool, they will have a clear story about the value of the Market Center to share with other Keller Williams agents and potential recruits. This not only demonstrates the leadership and value of the TL in the eyes of the ALC, it gives the TL the opportunity to talk value to the ALC: growth, productivity, profit, and Profit Share. This is a powerful and positive way to focus the ALC on what matters, where we are succeeding, and where we need to up our game. This creates synergy around achieving those goals and energy when you do so.

Also, the OP will also use Trend as an investment group consulting tool. Reviewing these numbers each month with the investors gives them a clear idea of how they can help the Market Center in the next 90 days.

As you share the numbers, find the categories to celebrate and then really celebrate them. Then ask, "Would you like to have more categories to celebrate?" Their answer will of course be, "Yes!" So figure out what the next focus should be and get all eyes focused on that. For most, a focus on productivity is a focus on increasing listings taken and listings closed because those categories drive other productivity categories. For recruiting, the number to drive will always be appointments, which will in turn drive gross and nets.

Growing the Numbers

Because the Trend tool is a leadership tool that allows you to quickly see what is going on in the Market Center in terms of activities for the last 90 days and vision for the next 90 days, it is an invaluable consulting tool for the OP-TL relationship. Just remember, there's no stick—only sugar! We're letting the numbers do the heavy lifting in terms of focusing the TL and MCA. They will be able to see their performance both in the historical context of the Market Center and in the context of Keller Williams and Regional performance. So we are using evidence, not emotion, to consult, which makes our leaders far more open to the coaching dialogue and what we need to do in our Market Centers to be on track with our goals.

When you review the Trend each month, consider the following:

1. How do our numbers compare to last month? Last year? Why?
2. How do our numbers compare to the Region's? Keller Williams Realty? Why?
3. What are the “report card” metrics, which tell us our performance for the last 90 days?
4. What do the report card metrics tell us about our last 90 days? Why is that? What does this tell us we need to do differently?
5. Which metrics are “vision” metrics that tell us what the next 90 days will look like?
6. What do the vision metrics tell us the next 90 days will look like? What can we do today to start making that future brighter?
7. How do these metrics match up to our Cap Management, Gross Goals, and Pipeline strategies? Do we need to adjust any goals to stay on track?
8. Which of these numbers are value stories we can share in recruiting appointments, investor meetings, staff meetings, ALC meetings, and team meetings?
9. Which of these numbers are opportunity stories we can share in our next investor meetings, staff meetings, ALC meetings, and team meetings to focus our efforts as a united Market Center on improving them?

Visioning Question:

What do I do today to make sure my growth net matches my goal in 90 days?

The goal of profitability is consistency throughout every month. Some months will naturally be more productive than others because of market seasonality. Be wary of getting too intoxicated by high profitability in the busy summer months—this can lead to expense creep and things like premature bonuses and dividends. Use the Trend along with the Cap Management, Gross Goals, and Pipeline tools to make sure that recruiting and profitability will also be there in the upcoming months, especially if those months are historically slow in your market.

Truth: It's units, not volume!

As you look to improve your numbers, make units your battle cry—not volume. You can't control the average sales price in your markets or the sales price band in your market that is selling at the moment. But you can control units by attracting top producers and teaching your agents to be more productive. As long as your office is generating the units and continually driving that number up, volume will grow.

Across the 41 categories of the Trend tool, one thing will help you with 39 of them: productivity-focused training. As your T² increases, your Trend numbers will also increase. The training you do today will drive your numbers 90 days from now, so focus on providing the right kind of training that gets the agents into action!

Trend



Cap
Mgmt

Gross
Goals

Pipeline

T²

Market Center Multi-Year Trends
Golden Oak - 7777
1234 Main St.
Center City
June 2014

Total Agent Count

*MOM = Month over Month for Jun - *YTD = Jan - Jun - every year calculates YTD for the same

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Jun	YTD Jan - Jun
2010	97	100	101	105	108	103	103	105	106	110	109	113	113	0.0%	0.0%
2011	110	113	114	118	118	119	118	117	120	120	127	130	130	15.5%	15.5%
2012	126	126	129	129	131	127	134	140	135	137	143	142	142	6.7%	6.7%
2013	147	150	152	146	151	155	153	154	154	159	159	161	161	22.0%	22.0%
2014	161	168	172	176	180	182							182	17.4%	17.4%

Recruiting Appointments

*MOM = Month over Month for Jun - *YTD = Jan - Jun - every year calculates YTD for the same

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Jun	YTD Jan - Jun
2010	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
2011	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
2012	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%	0.0%
2013	0	0	0	32	18	23	30	15	13	23	10	23	187	0.0%	0.0%
2014	23	13	25	27	35	19							142	-17.4%	94.5%

Gross Agent Gain

*MOM = Month over Month for Jun - *YTD = Jan - Jun - every year calculates YTD for the same

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Jun	YTD Jan - Jun
2010	5	3	4	5	2	3	4	6	5	4	2	6	49	0.0%	0.0%
2011	1	6	4	7	1	3	2	3	4	5	7	3	46	0.0%	0.0%
2012	3	7	5	6	4	3	7	8	5	6	8	2	64	0.0%	27.3%
2013	7	3	6	6	7	7	8	4	2	6	3	6	65	133.3%	28.6%
2014	5	9	9	7	8	5							43	-28.6%	19.4%

Net Agents

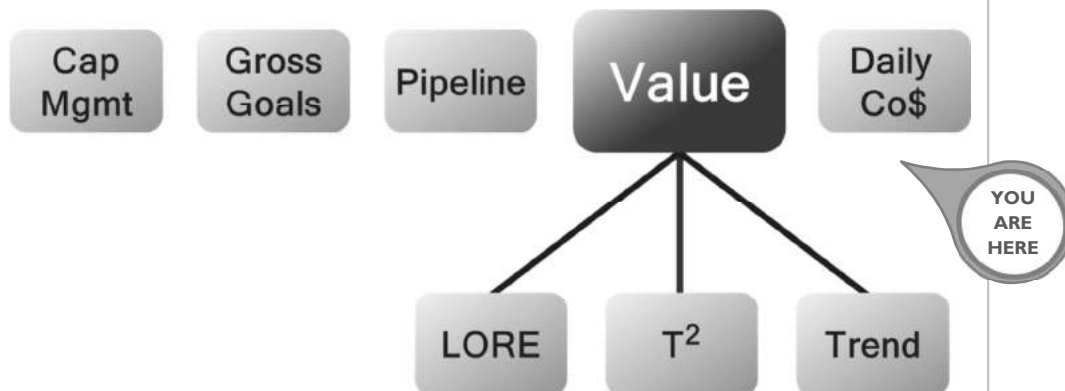
*MOM = Month over Month for Jun - *YTD = Jan - Jun - every year calculates YTD for the same

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Jun	YTD Jan - Jun
2010	1	3	1	4	1	-3	0	2	1	4	-1	4	17	0.0%	0.0%
2011	-3	3	1	4	0	1	-1	-1	3	0	7	3	17	133.3%	-14.3%
2012	-4	0	3	0	2	-4	7	6	-5	2	6	-1	12	-500.0%	-150.0%
2013	5	3	2	-6	5	4	-2	1	0	5	0	2	19	200.0%	533.3%
2014	0	7	4	4	4	2							21	-50.0%	61.5%

Multi-Year Trends Tool (Sample)

Daily Company Dollar Tool (Daily Co\$)

Where are we? The Daily Co\$ is the ultimate Market Center report card—and the final Growth Initiative tool.



Overview

Daily Company Dollar (Daily Co\$) is a daily report created by the Market Center that gives the Market Center:

- **A vision tool** to see how their Company Dollar is growing day to day, whether you are meeting the goal, and predict where you might end up in the month;
- **Focus** on deals that are falling through in order to fix the issues and retain agents and commissions; and
- **Visibility** into the impact on Company Dollar of what's being done (or not done) in the Market Center and consider what adjustments should be made.

Implement the Daily Company Dollar Tool!

The following pages provide content that may be used to have a dialogue with Market Center leadership in your Region to help them implement the Daily Co\$ tool.

What is the Daily Co\$?

Question: When do we as business owners turn profitable in any given month?

It may seem like a strange question until you consider that expenses usually recur each month, which means that each month our breakeven hurdle for the revenue we need to cover those expenses also resets. So another way of considering this question is, “How much of our month are we giving ourselves to focus on building our profit?” The earlier in the month we can overcome this breakeven hurdle, the more time we give ourselves to build profit in the Market Center.

As you begin to track Daily Co\$ and compare it to your monthly expenses, you will get better and better at predicting when in the month your Daily Co\$ will meet your expense needs for that given month. This “Breakeven Day” is a moment of excitement and energy in the Market Center. For the OP and investors, it means production from then on out will be profit. And for TLs who may be bonused on profitability, this is an energy tool because this is the moment where they are really ramping up their personal wealth creation.

By tracking your Daily Co\$, you can focus on shortening the time it takes to hit that breakeven hurdle each month. The Daily Co\$ tool helps us first by clarifying for the Market Center leadership what our baseline performance is and what initiatives we put into place are doing to improve and create a new baseline.

Take a look at the Daily Co\$ tool template. It is a basic worksheet that is easy to complete once you understand a few simple definitions:

- **Total** = deals that have closed, transactions have been entered in our system, and Co\$ has actually been deposited in the Market Center’s bank account for the current month
- **Outstanding** = Co\$ for deals projected to close in the current month; not everything we write will close at all or close in the current month
- **Best Case** = Total plus 100 percent of Outstanding Co\$
- **Fallout** = Total plus 80 percent of Outstanding Co\$ to account for deals that will not close. Your Market Center’s fallout may be more or less, in which case you can change the formula to represent your numbers
- **Last Year** = Last year’s Co\$ for the same period; this is a measuring stick comparing how we are growing year over year
- **Goal** = What our budgeted Co\$ goal was for the period

How Do We Use the Daily Co\$?

Completing the Daily Co\$ is a daily discipline. Every day at the close of business, the MCA will generate the report based on the changes to the closed and pendings that occurred during the day and then share the report with the OP and TL.

Truth: The Daily Co\$ allows you to see the BIG picture of what's happening with the revenue, so you can then drill down and find out why.

There are a number of things the Daily Co\$ will point out to you, so as you look at it, consider the following:

- What is our expense need this month?
- What is our goal for Breakeven Day? What day are we actually tracking toward right now?
- If Breakeven Day is getting earlier in the month from month to month: 1) great job!; and 2) what are we doing that is leading to this success? How can we improve on that?
- If Breakeven Day is getting later in the month from month to month, what aren't we doing that is allowing that? Is this a training issue, recruiting issue, or both?
- What is our fallout percentage? Is it decreasing or increasing? Why?

Another benefit of the tool for MCAs is peace of mind. Before the tool, many MCAs waited until the end of the month to understand closings and pendings. As a result, those MCAs' stress levels would go way up at the end of the month unnecessarily. With the habit of the Daily Co\$ where the MCA is tracking closing and pendings on a daily basis, it gives the MCA a better grasp of what deals are really going to close that month, which makes transmittal much smoother for the MCA at the end of the month.

Decreasing Fallout

While increasing productivity through training and recruiting is always a focus for us to increase our Daily Co\$, the quickest way to grow Company Dollar is to focus on the deals your existing agents already have and ensure that the greatest possible percentage of them close each month.

The MCA's focus on what closings and pendings there are for the month will naturally open up the dialogue with agents about where they are in their transactions and what's needed to get the deals done. This will uncover issues the agents are experiencing or anticipating that may cause the deal to fall apart. This in turn allows your MCA to provide "quick-fix" solutions to certain challenges.

As the MCA tracks and communicates these issues with the TL and OP, your Market Center leadership can also focus on solving the broader challenges the agents are facing that require more than a quick-fix. Are the Market Center's related service providers (mortgage, etc.) helping or hindering deals from closing? What skills and knowledge are the agents struggling with?

Clarity around fallout due to lack of knowledge and skills then helps the TL and ALC set training classes that will meet these challenges. When you can build training around the issues that agents are facing, it means that agents will attend, leading to more production, providing more value to your agents, and driving up T², LORE, and Trends for your recruiting.

Many agents depend on their deals going through to provide for their families and stay happy and healthy in the business. In that respect, the Daily Co\$ tool's ability to help you curb fallout is not just a Company Dollar retention tool; more importantly, it is an agent retention tool!

Helping Agents

There's one last way the Daily Co\$ tool can help your agents and Market Center. Running a Mega Agent team is very similar to running a Market Center. Because of that, Market Centers can also teach this tool to agents for tracking their Agent Commission Dollar and what it takes for them to break even and get profitable in any given month. A daily tool like this can be a great reminder of the importance of daily lead generation and the importance of bullet-proofing their transactions. This is both a retention tool for agents in the Market Center and a growth tool for the agents' individual productivity and therefore the Market Center's total productivity!

Daily Company Dollar Tool (Sample)

DAILY COMPANY \$ TOOL			
5/6/2014			
\$14,127.50	TOTAL	RECEIVED	
\$60,939.41	OUTSTANDING	PENDING TO CLOSE	
\$75,066.91	BEST CASE		
\$62,879.03	FALLOUT EST 20%	PROJECTION	
\$52,333.52	LAST YEAR		
\$83,072.00	GOAL		

Notes

The Regional Report Card

Regional Report Card																							
Market Center	Appointments				Gross				Tools							Net				Owner Profit			
	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal	Cap Mgmt	Gross Goal	Pipeline	TZ	LORE	Trend	Daily Co\$	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal
Market Center 1		31	287	360		13	78	80	x	x	x	x	x	x	x		8	23	27		5,289	61,732	167,737
Market Center 2		14	130	360		1	20	67						x			-5	-12	45		8,731	90,452	107,787
Market Center 3		28	198	360		7	61	88	x	x	x	x	x	x	x		4	18	27		456	60,650	88,760
Market Center 4		45	323	360		8	59	118	x	x	x	x	x	x	x		5	10	56		15,650	68,556	102,615
Market Center 5		40	289	360		12	84	49	x	x	x	x	x	x	x		3	36	35		28,479	149,522	137,247
Market Center 6		29	252	360		10	54	42	x					x			8	21	24		22,789	98,579	96,702
Market Center 7		41	271	360		5	31	67	x	x	x	x	x	x	x		5	13	36		26,288	141,072	181,621
Market Center 8		17	152	360		8	61	48						x			5	19	27		18,792	83,710	153,993
Market Center 9		23	172	360		9	44	84	x	x	x		x	x	x		2	15	42		4,263	23,482	79,304
Market Center 10		38	284	360		3	41	55	x	x	x	x	x	x	x		1	10	27		7,576	23,598	40,501
Market Center 11																							
Market Center 12																							
Market Center 13																							
Market Center 14																							
Market Center 15																							
Market Center 16																							
Market Center 17																							
Market Center 18																							
Market Center 19																							
Market Center 20																							
TOTALS		306	2358	3600		76	534	698									36	153	346		138,313	801,352	1,156,266

The Regional Report Card is a powerful tool that allows a Regional Director to quickly assess how successfully the Market Centers in their Region are implementing the Growth Initiative.

How to Use the Regional Report Card

Step 1. Fold the Regional Report Card

Regional Report Card																							
Market Center	Appointments				Gross				Tools							Net				Owner Profit			
	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal	Cap Mgmt	Gross Goal	Pipeline	T2	LORE	Trend	Daily Co\$	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal
Market Center 1		31	287	360		13	78	80	x	x	x	x	x	x	x		8	23	2		5,289	61,732	167,737
Market Center 2		14	130	360		1	20	67							x		5	12	4		8,731	90,452	107,787
Market Center 3		28	198	360		7	63	88	x	x	x	x	x	x	x	x	4	18	2		456	60,650	88,760
Market Center 4		45	323	360		8	59	111	x	x	x	x	x	x	x		5	10	5		15,650	68,556	102,615
Market Center 5		40	289	360		12	84	49	x	x	x	x	x	x	x		3	36	3		28,479	149,522	137,247
Market Center 6		29	252	360		10	54	41	x								8	21	2		22,789	98,579	96,702
Market Center 7		41	271	360		5	31	6	x	x	x	x	x	x	x		5	13	3		26,288	141,072	181,621
Market Center 8		17	152	360		8	63	45									5	19	2		18,792	83,710	153,993
Market Center 9		23	172	360		9	44	28	x	x	x		x	x	x		2	15	4		4,263	23,482	79,304
Market Center 10		38	264	360		3	43	8	x	x	x	x	x	x	x		1	10	2		7,576	23,598	40,501
Market Center 11																							
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Market Center 19																							
Market Center 20																							
TOTALS		306	2338	3600		76	534	698									36	153	34		138,313	801,352	1,156,266

a. Fold the report card so that **Appointments** and **Gross** are grouped together.

FOLD HERE

b. Fold the report card so that **Tools** and **Net** are grouped together.

FOLD HERE

Step 2. Compare Appointments and Gross

Appointments				Gross			
RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal
	31	287	360		13	78	80
	14	130	360		1	20	67
	28	198	360		7	61	88
	45	323	360		8	59	118
	40	289	360		12	84	49

- Appointments** – Inspect the number of appointments the Team Leader is achieving. There may be an opportunity for the Regional Director to consult the OP on supporting the TL in developing their skill in leveraging recruiting with the Language of Real Estate in order to make incremental progress in securing more appointments.
- Gross** – If the number appointments is not correlating to gross recruiting with a proportionate number of agents joining the Market Center, there may be an opportunity for the Regional Director to consult the OP on improving the TL's appointment to gross conversion ratio by supporting the TL in strengthening their needs analysis and value proposition demonstration skills.

Step 3. Compare Tools and Net

Tools							Net			
Cap Mgmt	Gross Goal	Pipeline	T2	LORE	Trend	Daily Co\$	RD Notes	MTD	YTD	YTD Goal
x	x	x	x	x	x	x		8	23	27
					x			-5	-12	45
x	x	x	x	x	x	x		4	18	27
x	x	x	x	x	x	x		5	10	56
x	x	x	x	x	x	x		3	36	35

- Tools** – The Regional Director inspects which specific Growth Initiative tools each Market Center has implemented in order to build their Wall of Value by delivering and demonstrating value for their associates.
- Net** – If the gross recruiting numbers the Team Leader is achieving is not producing the properly proportion increase in net recruiting results, the RD can then consult with their OP to help them in supporting their TL and staff to implement any tool(s) they are not leveraging to the fullest.

Step 4. Review Owner Profit

Owner Profit			
RD Notes	MTD	YTD	YTD Goal
	5,289	61,732	167,737
	8,731	90,452	107,787
	456	60,650	88,760
	15,650	68,556	102,615
	28,479	149,522	137,247

- Owner Profit** – The ultimate benefit of a Market Center leveraging the Growth Initiative tools is that they drive profitability. The Regional Director checks to see that the activities the Market Center Leadership are doing are correlating to the Owner Profit being produced. Outstanding activity levels ultimately resulting in outstanding Owner Profit is cause for celebration! If a Market Center's activities are not translating into Owner Profit, the Regional Director should consult with the OP to identify the systems, tools, or skills that can be improved to empower the Market Center to reach and exceed their profitability goal.

Regional Report Card

Appointments				Gross				Tools							Net				Owner Profit				
Market Center	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal	Cap Mgmt	Gross Goal	Pipeline	T2	LORE	Trend	Daily Co\$	RD Notes	MTD	YTD	YTD Goal	RD Notes	MTD	YTD	YTD Goal
Market Center 1		31	287	360		13	78	80	x	x	x	x	x	x	x		8	23	27		5,289	61,732	167,737
Market Center 2		14	130	360		1	20	67						x			-5	-12	45		8,731	90,452	107,787
Market Center 3		28	198	360		7	61	88	x	x	x	x	x	x	x		4	18	27		456	60,650	88,760
Market Center 4		45	323	360		8	59	118	x	x	x	x	x	x	x		5	10	56		15,650	68,556	102,615
Market Center 5		40	289	360		12	84	49	x	x	x	x	x	x	x		3	36	35		28,479	149,522	137,247
Market Center 6		29	252	360		10	54	42	x					x			8	21	24		22,789	98,579	96,702
Market Center 7		41	271	360		5	31	67	x	x	x	x	x	x	x		5	13	36		26,288	141,072	181,621
Market Center 8		17	152	360		8	61	48						x			5	19	27		18,792	83,710	153,993
Market Center 9		23	172	360		9	44	84	x	x	x		x	x	x		2	15	42		4,263	23,482	79,304
Market Center 10		38	284	360		3	41	55	x	x	x	x	x	x	x		1	10	27		7,576	23,598	40,501
Market Center 11																							
Market Center 12																							
Market Center 13																							
Market Center 14																							
Market Center 15																							
Market Center 16																							
Market Center 17																							
Market Center 18																							
Market Center 19																							
Market Center 20																							
TOTALS		306	2358	3600		76	534	698									36	153	346		138,313	801,352	1,156,266

Review Performance Regularly and Consult OP

General Guidelines

1. Meet each OP monthly to track Market Center production.
2. Prior to these meetings, you and your OPs should separately review the financials and tools.
3. Your monthly accountability sessions should be driven from your OP's 4-1-1 and numbers.
4. Make sure you understand the top issues for OPs in each phase of development.
5. Follow the KWU Consulting best practices for conducting your consulting sessions.
6. Keep a file for each Market Center. Have a tab in the file labeled "Next Meeting." Put all issues that come up between meetings in the Next Meeting tab.

Example: If they have modified one of the KW systems, write a note on this and put it in the file. Bring it up in the next accountability meeting. Exception: Compliance issues should be addressed immediately with legal@kw.com.

Notes

Developing New Market Centers

Ongoing Pipeline of Phenomenal Candidates

10 Major Sources	3 Ways to Make Contact
<ol style="list-style-type: none">1. Database of top 20 percent agents in your Region2. Allied resources:<ul style="list-style-type: none">• Title companies• Loan companies• Lawyers• Real estate contacts• Friends3. Your real estate community farm:<ul style="list-style-type: none">• Top associates in the market area• Conversions, acquisitions, mergers, and fold-ins• Managers currently with a real estate company• Real estate schools4. Your sphere of influence5. Seminars6. CRB/CRS lists7. Career opportunity meetings8. Educational events and seminars9. KW associates10. KW leadership	<ol style="list-style-type: none">1. By telephone. Five things people value that you will call them about: <hr/><hr/><hr/><hr/>2. In writing (email or regular mail). Five things people value that you will send: <hr/><hr/><hr/><hr/>3. In person. Five events or activities that put you face-to-face: <hr/><hr/><hr/><hr/>

The Franchise Document

Ten Things to Tell Your Prospects When Discussing the Market Center License

1. Who You Are

“I am the Keller Williams Regional Representative for the _____ Region. I locate qualified real estate professionals who are interested in owning a Keller Williams Market Center, explain the distinctive features of the Keller Williams system, take the candidate through the RSTLM process and consult with them in completing their franchise applications to send to KWRI for review. I cannot award you a franchise or guarantee that KWRI will approve your application.”

2. Franchise Disclosure Document (FDD)

“I will order the FDD for you from KWRI. It contains disclosure information required by the government, as well as useful information about KWRI, company financials, and the Market Center franchise system. It also contains samples of the contracts that must be signed if you are approved as a franchisee. You, your lawyer, and your CPA (United States) or CA (Canada) should read it cover-to-cover. If you have questions, you will be referred to KWRI’s Legal/Commitment Department. However, operating as a Keller Williams Franchisee is not for everyone, and you must ultimately rely on your advisers’ advice and your own best judgment.”

3. The Importance of a Lawyer

“I encourage you to have your lawyer review and explain the FDD, License Agreement, and other franchise information to you. The Keller Williams contracts are intended to fairly balance the rights of individual Market Center operators against KWRI’s interest in protecting the Keller Williams system. But you may find some of the obligations and restraints that the License Agreement imposes on a licensee unacceptable for someone with your behavioral style, financial position, or risk tolerance. It’s important to discover those issues prior to signing the agreement since there is no negotiation of these agreements. Additionally, any tax or estate planning should be completed prior to submitting the franchise application and signing the franchise documents.”

4. Who Awards the Franchise

“KWRI decides whether to award you a Market Center franchise. KWRI will take into account my judgment about your qualifications and your passion to succeed. But I cannot award you a franchise or guarantee that KWRI will approve your application. Please remember that nothing I say should be interpreted as a promise that you will be awarded a Market Center franchise.”

5. The RSTLM Process

“There is a process we go through to determine if we are a match and should be in business together. The steps include ...”

6. Profit Share

“The Keller Williams system embodies many distinctive features. Our Profit Sharing Program is one of them. If you recruit other successful associates for any Market Center, you may be rewarded by sharing in that Market Center’s profitability.

“Furthermore, the way you and your associates make money in a Keller Williams franchise is to sell real estate. We never encourage you or your associates to focus primary attention on recruiting other associates other than emphasizing that higher associate counts can lead to higher revenue and profit for the Market Center.”

Note: KWRI knows of no state/provincial law or regulation under which the Profit Sharing Program would be illegal anywhere in the United States or Canada. However, you are responsible for making certain that the Profit Sharing Program is legal in your area.

7. Commissions at Closing

“Another practice that distinguishes a Keller Williams Market Center from other brokerage operations is paying our associates their commissions at closing. We have reviewed the ethics rules of the National Association of REALTORS® (United States) and the Canadian Real Estate Association (Canada) and Real Estate Commission regulations and are satisfied that the practice of paying commissions at closing is legal.”

Note: You are responsible for making certain that this statement is true in your area as we are aware of situations in which it has been challenged.

8. Noncompete Issues – Employee

“If you work (or formerly worked) under contract with another franchised or independent real estate company, have your attorney check your contract for restrictions that might stop you from opening a KW Market Center or recruiting associates to join your Market Center. Also, see what your contract says about client lists and other materials your previous affiliations may claim as confidential or proprietary.”

9. Noncompete Issues – Former Owner

“If you had ownership in another real estate franchise, check your agreement for covenants against competition and other restrictions that might stop you from joining Keller Williams Realty or from recruiting others to join your Market Center. Also, see what your contract says about client lists and other materials the franchisor might claim as confidential or proprietary. KWRI will require written evidence that you have severed your ties with the franchisor and that you are free to discuss a new affiliation with the Keller Williams system. It is imperative that you have your attorney review any previous contracts or agreements prior to purchasing a Keller Williams franchise. KWRI has no control or responsibility for problems related to your previous contractual obligations that arise before or after you purchase your Keller Williams franchise.”

10. Don’t Jump the Gun

“Don’t sign a lease, or incur other financial obligations for your proposed Market Center location, prior to being awarded the franchise. Sometimes there are regulatory problems or other issues that might slow us down. When this happens, the process cannot be rushed. Don’t jeopardize your chance of being approved by jumping the gun. You and you alone bear the responsibility for any contracts you have signed.”

Key Provisions of the License Agreement

1. Market Center Awarded Area – Production

The License Agreement describes a territory, an “Awarded Area,” that is the franchisee’s to develop. Only one Market Center may be opened in an Awarded Area, but this does not prohibit other Keller Williams franchises and their agents from providing real estate brokerage services to customers within the Awarded Area. Beginning in the seventh month after the Market Center opens, it must begin averaging \$20,000 a month in closed GCI. The benchmark moves up to \$45,000 in the thirteenth month and to \$125,000 in the twenty-fifth month. If it fails to meet and maintain these averages, KWRI may begin a process to notify them of this default. KWRI can also adjust the Awarded Area after three years if the owners haven’t maximized the market’s potential. However, KWRI will not leave the franchisee with an area that has an awarded area potential of less than 1,000 closed units and approximately 500 associates.

Note: A Unit reflects one transaction, a single property bought and sold, not buy and sell sides of one transaction.

KWRI may approve the grant or operation of a Strategic Market Center in a distinct market that has less than 1,000 closed units and 500 associates. Depending on the potential production in the market, KWRI may not enforce the above-referenced GCI requirements and may allow for modified leadership requirements.

2. Market Center Awarded Area – Growth

KWRI may also adjust the Awarded Area if the market’s potential ever grows significantly beyond 1,000 closed units. In that case, KWRI may combine part of the Awarded Area with enough new territory to create a separate market with a volume potential of at least 1,000 closed units a year. Under certain circumstances, the franchisee may have the first option to open a second Market Center in the new territory. KWRI will take care to ensure that the original Awarded Area still contains at least 1,000 units in annual closed unit potential at the time the adjustment occurs.

3. Competition

The License Agreement shelters the licensee from competition from other Keller Williams brokers to the extent that KWRI will not permit another operator to open an office in an awarded territory. There are no other exclusive rights in the awarded territory, and the

licensee does not “own” it. Other Market Center operators are free to advertise, accept listings, and show properties in an awarded territory. They may also recruit associates in the awarded territory from any organization except Keller Williams Realty. The License Agreement restricts the activities that may be conducted in another Market Center’s territory. You may not open an office of any sort in another’s territory that is identified in any way with the Keller Williams name, and you may not recruit associates from another Keller Williams office. KWRI expects you to focus on other competing offices, not your fellow Keller Williams franchisees.

4. Market Center Financing

A licensee may want to finance their Market Center by inviting others to invest in the business entity (corporation, partnership, or LLC) that will hold the Market Center license. The licensee may want to motivate or reward top producers by giving them a chance to invest in the Market Center. So long as the Operating Principal retains a majority interest of the voting rights in the entity that holds the license, and the potential investors have the financial capacity and a clean cultural history, KWRI will allow the franchisee entity to have multiple investors. However, strict legal rules apply to the offering of ownership interests in business entities, and KWRI expects the licensee to comply with those rules. Therefore, if ownership interests are offered in the business, any offering materials required by federal or state/provincial law must be submitted to KWRI for review. The licensee must pay KWRI a fee to cover its review costs. The minimum fee is \$2,500. It may go higher if KWRI’s legal fees and related expenses exceed that amount. Remember, no ownership may be granted without KWRI’s express approval, and KWRI always has the right of first refusal.

5. Residential and Commercial Brokerage

The Keller Williams training programs and operating systems relate to the brokerage of residential and commercial properties. The License Agreement says that other services cannot be offered under the Keller Williams name or from the Market Center.

6. Capping Policy

KWRI currently caps each associate’s commission income at \$50,000 for purposes of calculating the six percent production royalty. Once a licensee has remitted \$3,000 in royalty for an agent in a given anniversary year, no more royalty is owed on that agent’s commissions, within each Region. Understand that the commission cap reflects a policy KWRI currently follows; nothing in the License

Agreement caps the royalty on agent commissions at \$3,000 or at any other amount. KWRI can change its policy at any time to raise the cap, or eliminate it altogether, and a licensee must comply with KWRI's new policy.

7. Internet Advertising

KWRI supports Internet advertising and encourages its licensees and their associates to develop their own websites. However, KWRI has set some rules on the use of the Internet. The most important rules relate to the domain name and the website's design. When a licensee selects a domain name for their website, they must receive prior approval from KWRI if it contains any of the Keller Williams trademarks. KWRI will then grant a license to use the domain name for as long as the licensee/agent is associated with the Keller Williams organization. Agents may not register domain names that contain Keller Williams trademarks. Domain names for Market Centers must indicate the territory of that office and cannot be overly broad, i.e., KW Chicago, KW Dallas, etc.

8. Noncompetition

Most franchise companies prohibit their franchisees from engaging in competing businesses, both while they are franchisees and for a time after they leave the organization. The Market Center License Agreement contains a noncompetition agreement that protects the Keller Williams system, yet recognizes that KWRI cannot expect a former licensee to give up their livelihood. Of course, during the time a licensee operates a Market Center, they cannot operate or own an interest in another real estate brokerage business or other competitor of KWRI anywhere or under any circumstances. *Note: This applies to any investor as well.* In addition, for two years after they sell or close their Market Center, they cannot operate or own an interest in a competing real estate brokerage business. This restriction applies to any real estate brokerage business within ten miles of a Market Center that is in operation or under development at the time they leave the Keller Williams organization.

9. Disputes/Disagreements

Everyone begins a business relationship with the hope that neither side will get crosswise with the other. But a License Agreement continues for a long time, and disagreements occasionally develop. KWRI firmly believes that lawsuits are not an appropriate way to settle disagreements; they're too expensive and drag on too long. Consequently, the License Agreement contains a twofold approach to dispute resolution. If you have a dispute with KWRI that you can't talk through and work out, the first action is to turn to a professional mediator whose job it is to help both sides analyze their positions and see whether there is common ground for settlement. If mediation doesn't work, binding arbitration follows. KWRI has also developed a third program that anyone in the Keller Williams family can use to address a grievance with any other family member. This informal arbitration program, detailed in the Policies and Guidelines Manual, will look to members of the Keller Williams family to help people find creative solutions to their disputes.

A Dozen Legal Dos and Don'ts in Franchise Sales

1. Always provide a FDD as required in your state/province when discussing the Market Center program. These may be ordered at fdd@kw.com and will be sent to your prospect directly via an emailed online link.
2. Always have a prospect sign the receipt (Item 23 in the United States or Disclosure Receipt in Canada) in the FDD and send it to the Legal/Commitment Department the same day. Anyone with potential Market Center ownership must be disclosed prior to attending FSO. If someone attends FSO without the proper disclosure, they may NOT be permitted to be a part of the ownership group for months. Make sure people are properly disclosed!
3. Always tell prospects that your responsibility is to explain the Market Center franchise program, take them through the process, and to assist them in completing the application process. KWRI alone decides who will be awarded a franchise.
4. Never tell a prospect that he/she clearly qualifies for a Market Center franchise or otherwise imply that you can guarantee that KWRI will act favorably on an application.
5. Never tell a prospect that he or she must agree to allow you to invest in the Market Center before you will submit his/her application or give a favorable recommendation.
6. Never speak or correspond with the owners/operators of another real estate brokerage franchise (RE/MAX, Century 21, Coldwell Banker, etc.) to ask if they're interested in joining the Keller Williams system—even if they contact you first or you hear from a reliable source that they're interested in making a change. If their franchise is up for renewal in 3–6 months, contact the Legal Department to discuss. If you know or discover that a prospect has owned or been part of a group that owned another real estate brokerage franchise, always obtain a letter from the previous franchisor stating that he or she has formally terminated the relationship and is not bound by a covenant not to compete with the other franchise system and obtain copies of documents that substantiate these statements from their prior affiliation. If you have any questions, contact the Legal Department at KWRI to discuss.

7. Never suggest to a prospect that you can arrange for him/her to begin operating a Business Center under another's Market Center license while KWRI reviews his/her Market Center application.
8. Always instruct a prospect to defer signing a lease, printing business cards, etc., until KWRI notifies in writing that his/her Market Center application has been approved.
9. Never describe the Profit Sharing Program as an annuity plan or tell a prospect that the easiest way to make money in the Keller Williams system is to recruit associates into a downline organization.
10. If a prospect indicates that he/she wants to negotiate changes in the Market Center License Agreement, always tell them there is no negotiation. If they want their attorney to discuss, always refer him/her to the Legal Department; never attempt to negotiate any changes or concessions yourself or through your own lawyer.*

**Note: KWRI has a longstanding policy of not negotiating changes.*

Expectation—a Home Run Launch

KWRI Home Run Launch Award Criteria

1. First 12 transmittals with a Total Profit exceeding \$100,000.
2. Higher Profit than any other Market Center in the Launch Phase for the first 12 transmittals.

Home Run Launch Indicators

1. Icon Operating Principal
2. Rock Star Team Leader
3. Incredible Investor Group of Agents
4. Opens with 40 Producing Agents
5. Quickly becomes the dominant real estate company in the area
6. At first transmittal has 60 agents (90 days after approval)
7. Grow to 100 or more agents within the first 12 months

Notes

The Preapplication Process

Process		Tools/Resources
1	Locate and meet prospects.	<ul style="list-style-type: none"> • Scripts • Contact Management • Recruiting Toolbox • 33 Touch program • FDD
2	Select the <u>best</u> candidate.	<ul style="list-style-type: none"> • Needs Analysis • Track record of incredible success
3	Follow the RSTLM process.	<ul style="list-style-type: none"> • KWU RSTLM courses • Recruit-Select packets • Behavioral assessments
4	Identify expectations.	<ul style="list-style-type: none"> • Expectations worksheet created during RSTLM

The Preapplication Process (cont.)

1. Begin the screening process with a qualified lead.
2. During the process, determine whether to begin RSTLM.
3. Make a presentation, introduce the concept of RSTLM.
4. If you have a real candidate, before they complete RSTLM, direct the person to Launch/FSO in Austin.
5. As a result of the trip to Austin and RSTLM, make a decision on whether to move forward (if the person does not go to Austin, they do not pass the test and the answer is no) Note: Based on the trip to Austin, the candidate may now be very excited about ownership in a KW franchise.
6. Make an RSTLM decision, and if you believe that this is indeed a candidate, at that point, go through orientation with the person to explain the track that will need to be followed to open a Market Center.
7. Introduce the tracking guide and define expectations. Share what you have learned are successful ownership models for opening a Keller Williams Market Center. Talk through the different structures of the ownership model, including the Core Group, LLCs, etc.
8. Give them the Forecast Model as homework. Tell the candidate that since they have attended Launch/FSO, and have had good exposure to the models, they need to complete the Forecast Model based on the numbers that they decide that they can achieve.
9. Share with the candidate that one of the key concepts to a successful launch is the recruiting of the Core Group.
10. Instruct the candidate to use their influence to attract a Core Group.
11. Help with the presentations to the Core Group, either individually or together. The OP candidate does not make the presentations. Control the presentations so that the OP may observe them. Over the next month or so, as key member agents begin to surface, the OP will make the presentations initially.
12. As you are making the presentations, have absolute focus on making sure that the Core Group embraces the ownership model that will ensure an effective and successful Launch.
13. Then inform the Core Group that they must attend Launch/FSO en masse. This is the OP's second time to attend.
14. Qualified, with mutual expectations defined, the entire Core Group goes to Launch/FSO.
15. If they go, they pass the test, and get the application.

Make Appointments and Consult

Make the Appointment

Important Notes: These figures are based on cold calls. If the calls are warm, you will reach your goal faster. Remember—you are seeking talented candidates who are capable of and driven to build the number one real estate office in their community!

Start by embracing the numbers.

30 Cold Calls = 1 Legitimate Lead

3 Legitimate Leads = 1 Franchise

Therefore, 90 Cold Calls = 1 Franchise

1. It takes 4–6 months from the time you first make contact with the lead until they sign the document.
2. It takes 4–6 months from the time they sign the document until they open their Market Center.
3. So, if your goal is to award five franchises in one year and have all of them open in the same year;
 - a. You must plan to make up to 450 cold calls.
 - b. You must plan to make them all within the first four months.
 - c. So, you must make 112 cold calls a month for the first four months (or ~seven calls a day over fifteen workdays).

Franchise Prospects Qualifying Questions (Sample)

Name: _____

Address: _____

Phone Numbers:

Work: _____

Home: _____

Cell: _____

VM: _____

Email: _____

How did you hear about Keller Williams Realty?

What area are you interested in?

What are your objectives/goals?

What do you see your role being as an owner of a Keller Williams franchise?

What is your profession? What professions have you had?

What other franchise systems are you considering?

When can you meet with the Regional Director?

Will you be partnering with anyone? Yes or No

If Yes, then with whom? (Get phone numbers)

Would they be interested in meeting with the Regional Director, also? Yes or No

Preparing for Your Appointment

Your Recruiting Toolbox could include the following:

1. Twenty *The Millionaire Real Estate Agent* and twenty *SHIFT* books.
2. Top agent bios
3. Articles
4. Roster
5. KWU calendar and course descriptions
6. Regional training calendar
7. KWU manuals (especially Launch)
8. FDD (Franchise Document) – These are ordered from FDD@kw.com and sent directly to the prospect via email.
9. Forecast Model
10. Franchise applications – Downloadable from Regional Intranet.
11. Twenty RSTLM packets

Handling Objections

1. Setting the Stage
2. Needs Analysis
3. Your Story
4. The Four Pillars of Success:
 - Keller Williams Realty has a system and documented process for building a profitable high-volume real estate company.
 - Success through people is the cultural differentiating factor:
 - WI4C2TS/Culture
 - Associate Leadership Council
 - Profit Share
 - You must develop people in order to succeed through them:
 - Keller Williams University
 - Personal Development – Masterminds and KW MAPS Coaching
 - *The Millionaire Real Estate Agent* and *SHIFT*
 - Freedom from doing a job = owning a successful business

The goal is to get them ...

- To Austin.
- To Launch/FSO.
- To begin the RSTLM process.
- To Mega Camp and Masterminds.
- To Family Reunion.
- To something!

Select Best Prospect

Consider the following when taking prospects through the RSTLM process:

1. Previous Business Experience
 - Track record of developing a highly successful, highly profitable Keller Williams Market Center
 - Track record of developing and/or owning highly successful, highly profitable real estate offices
 - Business consulting skills
 - Track record of running Mega Agent teams
2. Financial Resources
 - Appropriate financial resources available for Market Center capitalization
3. Market Expertise
 - Influence in the area
 - List of target prospects
 - Business plan
 - Detailed market information
4. Leadership Characteristics
 - AVA
 - References
 - Past accomplishments

Follow the RSTLM Process

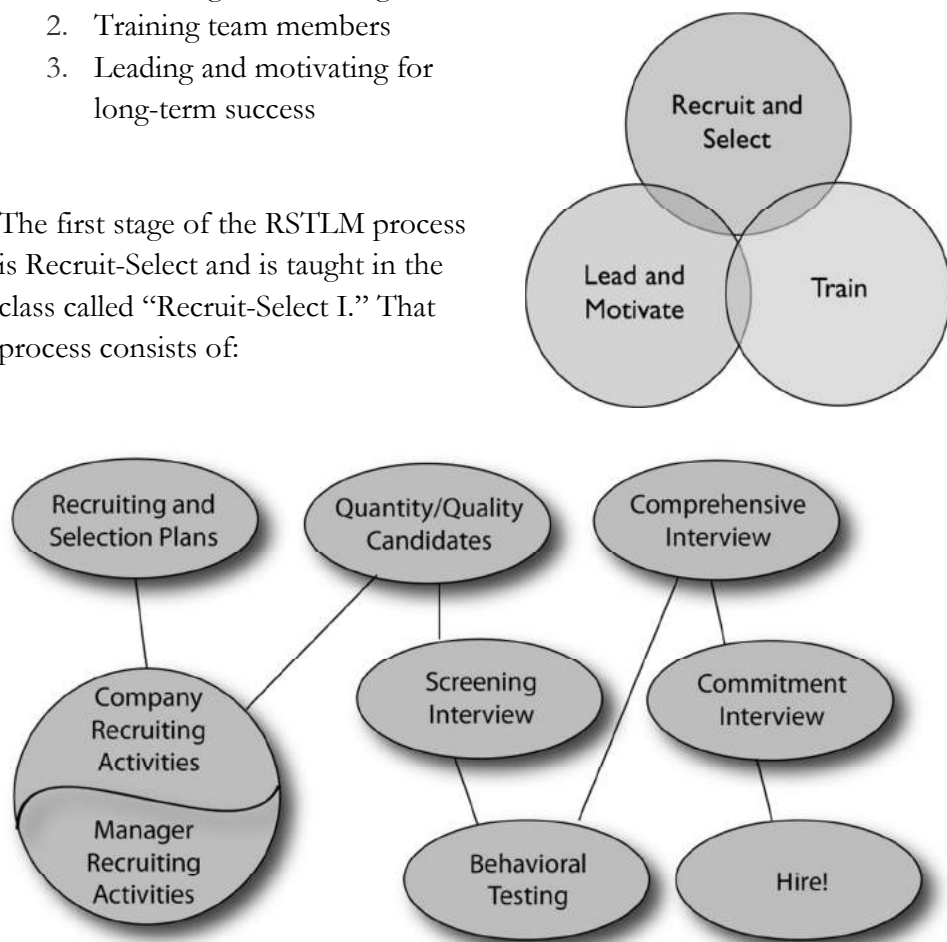
1. Explain the RSTLM process during your Recruiting Consultation.
2. If the Recruiting Consultation is going well, have the prospect take the DISC.
3. Prospects should attend Launch/FSO as part of the RSTLM process.
4. RSTLM is a required series of courses for all Regional leadership.

The RSTLM Process

The RSTLM process supports you through three key phases:

1. Recruiting and selecting talented candidates
2. Training team members
3. Leading and motivating for long-term success

The first stage of the RSTLM process is Recruit-Select and is taught in the class called “Recruit-Select I.” That process consists of:



NOTE: Talent Pushes You!

Keep in mind that an individual's AVA "match" with a JAR does not indicate how good they are at that job! A good behavioral match between an AVA and a JAR simply means that the person will not have to adjust their natural style very much in order to succeed at that job. Besides behavior, two other major factors in job success are an individual's skills and the quality of training. Keep in mind that the more behavioral "shifts" a person has to make to meet the job's demands, the more difficult it will be for them to succeed. If a person is poorly matched with their job, no matter how good the training or the skills they have, over time the job's demands will become more and more stressful for them and can lead to poor performance, low morale, and burnout.

The Operating Principal JAR is a 9515, and the single key element to success in this role is having a high Vector 1—a very high level of drive and willingness to take a risk. In addition to those whose AVA graphs are very close to this model, such as the 9524, the most successful OPs include a 9353 and an 8471. All of these management styles have produced great results.

- The 8471 has an entrepreneurial and very quality-oriented approach, versus the faster pace of the 9515; she will tend to focus on creating harmony in the team.
- In contrast, the 9353 brings a strong focus on problem-solving and strikes a balance between getting results fast and being very thorough.

Profile of an A+ Franchise Owner

1. Successful without the help of KWRI. “They don’t need me—I need them!”
2. Respected and valued in the marketplace, most logical choice.
3. A team player and a team builder.
4. Has a strong personal belief system that mirrors “WI4C2TS.”
5. Is a leader, a trailblazer, a pioneer, a maverick, a rebel, edgy, provocative, and creative, instead of a follower. Loves to develop leaders and knows how.
6. Understands they’ve been awarded a system.
7. Will enhance Region by bringing needed skills and talent.
8. Profit oriented, but associate driven. Knows the associate is our customer.
9. They attract other A+ owners.
10. **Someone for whom you would want to work.**
11. Learning-based—they see the value in training.
12. Understands “Interdependence.”
13. Will make a commitment to train, manage, support, and properly compensate leadership, as well as hold them accountable to implement the entire system.
14. **Someone you would hate to compete against.**
15. Understands and sees the value in local, regional, and international structure.
16. Believes in helping people get what they want and can demonstrate abilities in this area.
17. **Sees the value of delegating, and will hold their leadership team accountable.**
18. A minimum of \$150,000 cash.
19. Has the financial resources necessary to maintain a successful Market Center.
20. Understands that the KW system is a set of management tools they must now take and use. They naturally see how to use them to build a company.
21. Sees the value in changing to KW.

Identify Expectations

What OPs Should Expect

1. You will be available to consult with them.
2. The Regional office is available to support them.
3. The Region will hold world-class KWU events and will send recruiting leads that result from those events directly to each OP.
4. You are committed to building the Region, fast, hard, and profitably.
5. You will manage your performance in accordance with the five areas of accountability.

What You Should Expect

1. The Operating Principal raises sufficient cash/capital to launch properly.
 - (\$150,000 is the minimum required by the document.
 - \$250,000-\$300,000 may be required in larger markets.)
2. The Market Center will take no more than 120 days to fully launch.
3. The OP is willing to commit to a heavy six-month intensive effort to build their Market Center and implement systems for continued growth and profitability.
4. The Market Center will set up and follow all aspects of the KW models and systems.
5. The OP will be accountable.
6. The OP will hire and retain top quality Market Center leadership and continually develop a bench of leaders for future opportunities.
7. The leadership and staff will attend required training.
8. Masterminding and KW MAPS Coaching.
9. The leadership and staff will get fully trained within the first year.

Core Group

Current standards are as follows:

1. Five icons/megas:
 - Proof of previous recruiting influence
 - Positive background check
 - Positive local reputation
 - Consistently high volume
 - Track record of ongoing education
 - D/I or I/D
2. Minimum of twelve Cappers
3. Minimum of twenty associates at application
4. Minimum of forty associates at first transmittal

Note: These are minimum expectations!

Profile of a “Core Group” Agent

1. Fabulous reputation among agents, vendors, etc.
2. Most ethical dealings with agents and public
3. Strong listing base and current inventory
4. High volume agent in the territory
5. A team player in current office
6. Shares knowledge with others
7. Wants to be part of a team
8. Learning-based history
9. Desires wealth building
10. Embraces the KW model, values, beliefs, and concepts

The MC Application Process

Process		Tools/Resources
1	Candidate finalizes and submits the application to the Region. The Region submits to KWRI after full review.	<ul style="list-style-type: none"> • <i>Regional Leadership Manual</i> • Checklist of required steps • Legal/Commitment Department • Application(s)/Regional Intranet
2	<u>COMPLETE</u> Application received in Legal/Compliance Department. Applications reviewed and responded to within 48 hours.	<ul style="list-style-type: none"> • KWRI
3	Applicants have 30 days to fulfill missing requirements after notification; Applications still incomplete after 30 days will be sent back to the Region.	<ul style="list-style-type: none"> • Regional Leadership • KWRI
4	Approval by KWRI	<ul style="list-style-type: none"> • Legal/Commitment Department • KWRI Executives
5	Award Franchise	<ul style="list-style-type: none"> • License Agreement sent for execution and return • Legal/Commitment Department
6	Signed Documents returned to 1. Franchisee 2. Region	<ul style="list-style-type: none"> • Signed License Agreement • Legal/Commitment Department • KWRI CEO

Notes



Application
for the

Market Center

In the

Region

Instruction:
Always pull the current
version of the Application for
each new candidate from the
Regional Intranet.



(For U.S. and Canadian Market Centers only)



v 1.14

Requirements

- To apply for a Market Center, the items on the following pages, with accompanying documentation, must be completed and submitted to your Region, who will then submit to Keller Williams Realty Inc. (KWRI) for review.
- **KWRI will return Market Center applications to the Region without approval in the event any missing documentation or requested information is not provided within 30 days.**

- 1 Initial Information
- 2 Operating Principal Recruit Select (for new OP's)
- 3 Multiple Market Center Application (for existing OP's)
- 4 Authorization to Proceed Package
- 5 Initial Capitalization
- 6 Licensee Fee
- 7 Licensee Entity Documents
- 8 Licenses, Memberships and Insurance
- 9 Consultants and Service Providers
- 10 Review and Submit

NOTE: The proposed new Market Center will not be fully-approved and final until there is recommendation from the Region, KWRI approval, and all required new License Agreements and related documents are fully executed. KWRI will notify the Market Center and the Region when the process is complete and the Market Center is approved and authorized to begin operation.

Section 1

Initial Information

➤ The KWRI L
the following
Agreements
information is
information in

Instruction:

Check each box as completed
to ensure that all necessary
information is submitted.

Information provided in
ration of the License
is critical that this
be used as the official

☒ The File Data Sheet has been completed in full.

☐ The ownership section (Section 15) shows the breakdown of all investors or entities with any direct ownership in the Market Center along with the investor's/entity's respective percentages:

(Ex:)	John Doe Enterprises, LLC	75%
	John Doe	70%
	Jane Doe	20%
	Robert Marks	10%

☐ Section 17 shows the most recent FSO attendance dates of ALL leadership (OP, TL and MCA) and Market Center investors as well as the most recent Investor Workshop attendance dates for all investors.

☐ The File Data Sheet has been signed by the OP.

☐ The File Data Sheet has been signed by the RD.

Naming and Logo Standards

1. **License Entity Name** – May not include Keller Williams trademarks (e.g. Keller Williams, KW, WI4C2TS, etc.)
2. **Market Center Roster Name and Market Center DBA** – These names should be specific to the proposed Market Center’s market and should not be overly broad or confusingly similar to an existing Market Center.
3. **Primary Logo** – Only the DBA name approved by KWRI can appear in conjunction with the primary logo.

No additional words or design features may appear between the logo and DBA name. For marketing and design purposes, a DBA name with twelve or fewer characters is recommended.

Examples

kw DBA NAME
KELLERWILLIAMS.

kw DBA NAME
KELLERWILLIAMS. REALTY

**kw DBA NAME MORE THAN
TWELVE CHARACTERS**
KELLERWILLIAMS.

**kw DBA NAME MORE THAN
TWELVE CHARACTERS**
KELLERWILLIAMS. REALTY

**KELLER WILLIAMS REALTY, INC.
FILE DATA SHEET**

Please note, the information you record in this document is the **first source of information** Keller Williams Realty, Inc. (KWRI) references when needed, so **it is crucial this information is the most current and accurate.**

LICENSEE INFORMATION

1. Licensee Entity Name

(Name of Corp, LLC, or Partnership)

2. Market Center Roster Name

(Geographic Descriptor – Internal KW Roster Name)

NOTE: The Market Center Roster Name is used to populate all websites and is otherwise used to identify the Market Center within the Keller Williams Realty technology systems. If your state/province, local real estate trade association(s) or any listing service(s) that you utilize requires your legal entity name to be displayed on your online marketing, you should list your legal Licensee Entity Name as your Market Center Roster Name on this File Data Sheet in the form that they require.

3. Market Center DBA

(Name MC Presents to Consumers)

4. Operating Principal

Name

Mailing Address

Phone

E-mail

5. Team Leader

Name

Mailing Address

Phone

E-mail

6. MCA

Name

Mailing Address

Phone

E-mail

7. Technical Coordinator

Name

Mailing Address

Phone

E-mail

Instruction:

If these roles have not been established at application, provide Recruit-Select status for each position.

8. Awarded Area:

Should match Section 4B in the Market Research section or reference to see that section for a complete description and map

MUST BE PERMANENT BOUNDARIES (STREETS, STATE LINES, COUNTY LINES, RIVERS, ETC.) AND CONTIGUOUS.

9. Zip/Postal Codes within the Awarded Area:

10. Multiple Listing Services Utilized by:

NOTE: This information is used to:

MLS

Registered Broker

11. Four Primary Areas (cities, towns, school districts, etc.) providing services:

12. Market Center
Mailing Address

Phone

Is this a temporary address?

Yes

No

13. Mailing Address for
Corp. Notices.
Phone

14. Licensee's Region

Sample Awarded Area Description:

That area circumscribed as follows:

Beginning at the intersection of Route 345 and Highway 9; West on Highway 9 to Highway 20; South on Highway 20 to Highway 90; East on Highway 90 to Route 345; and North on Route 345 to the intersection of Route 345 and Highway 9, the beginning point.

Instruction:

Market Center should be centrally located within the Awarded Area.

15. Investors and their Percentages. For any entities with equity interests in the Licensee, please provide a full ownership breakdown and the investor's respective percentage of ownership within that entity.

Name	Percentage

Instruction:
Include breakdowns for any entity used to hold interests in the Market Center.

NOTE: All investors must be disclosed with the current Franchise Disclosure Document and must return an Item 23/Disclosure Receipt. Any with a direct or indirect interest of 20% or more must also submit a current, signed Financial Statement.

16. Ownership in other Market Centers, using MC number and Roster number and/or Ancillary businesses, i.e. Mortgage, Title, etc – please list including percentages, for any/all investors below.

Instruction:
Should not reflect “treasury” or “reserved” interests. Should reflect ownership as a percentage of interests actually issued.

17. Franchise Systems Orientation (FSO) Attendance and Investor Workshop (Last date of attendance)

Name	FSO	Investor Workshop
OP - _____	_____	_____
TL - _____	_____	_____
MCA - _____	_____	_____

NOTE: Please note that each new investor/staff member must attend FSO prior to approval of the application. Existing investors/staff members will need to note an attendance date for FSO within the last 3 years. The Investor Workshop is required for all investors prior to approval.

Completed by: _____ Date: _____
Operating Principal

Approved by: _____ Date: _____
Regional Director

Section 1A

Disclosures

- The Regional Director or Regional Operations Manager requests the Legal/Commitment Department to send a current Franchise Disclosure Document (FDD) to all investors in the Market Center.

☐ The Market Center has provided the Region with the names and email addresses of ALL investors in the Market Center for disclosure.

☐ The Region has requested these Disclosures be sent from KWRI

FDD INSTRUCTIONS:

NOTE: It is vital that your attorney and/or Certified Public Accountant (US)/Certified Accountant (Canada) review the FDD with you.

Each proposed investor is sent an email with a link and access codes for the applicable FDD and Item 23 (US)/Disclosure Receipt (Canada). They may request a CD or printed copy by contacting the Regional Director or sending an email to fdd@kw.com.

Upon receipt of the email, please access the FDD and print, complete, sign and date the provided Item 23/Disclosure Receipt (as applicable) in accordance with the instructions.

Please scan and email the signed and dated Item 23/Disclosure Receipt (as applicable) to KWRI at fdd@kw.com. If you have any problems with the transmission, contact the KWRI Legal/Commitment Department at (512) 327-3070.

We encourage you to read the entire FDD. To access the contents of the FDD, read the “HOW TO VIEW/DOWNLOAD” page. You will be able to download the document onto your computer using Acrobat Reader. If you don’t already use Acrobat Reader, you can download it free from the Internet.

The License Agreement, a copy of which is provided in the current FDD and which will be executed once approved, may be substantially different from your current License Agreement.

Section 2
**Operating Principal Recruit Select
(for new OP's only)**

- The Regional Director completes the Recruit Select process with the OP candidate, including an in-person validation of the AVA behavioral assessment and Comprehensive Interview.

- ☐ The AVA has been validated by the Regional Director and included in the submission of this application.

- ☐ The Comprehensive Interview Worksheet has been completed by the Regional Director and included in the submission of this application.

- ☐ The References section has been completed and included in the submission of this application.

- ☐ Franchise Application Questionnaire has been completed in full and signed by the OP and RD.

Section 2

Franchise Application Questionnaire

Thank you for applying for a KELLER WILLIAMS REALTY, INC. Franchise. KELLER WILLIAMS REALTY is excited about the possibilities for a dynamic and successful interdependent partnership with you. Please complete this questionnaire as thoroughly as possible.

Name: _____

Home Address: _____

Work Address: _____

Home Phone: _____

Work Phone: _____

Instruction:

Not required for an existing
OP—Complete Multiple Market
Center Application instead.

1. Please give a brief description, starting with the present, of your real estate background:
(Should you need additional space, please attach a separate sheet.)

COMPANY	DATE	ROLE	INCOME	REASON FOR CHANGE

2. Have you ever sold or leased residential and/or commercial real estate? ☐ Yes ☐ No
If so, for how long? _____
In your selected territory? _____

3. Have you ever managed a residential or commercial real estate office? ☐ Yes ☐ No
If so, please describe. (Should you need additional space, please attach a separate sheet.):

For whom? _____

How long? _____

Where? _____

Why did you stop?

How many associates did you have when you began? _____ When you left? _____

How many associates did you personally recruit? _____

How did you recruit them? _____

What was the average monthly written and closed sales volume in your office?

What was the average office listing inventory when you began and when you left?

5. Describe your educational background in real estate? _____
6. Describe your training experience and abilities with new and experienced agents:

7. Describe your experience with speaking before groups: _____
8. Who is the most important person in a real estate organization and why? _____
9. How would others explain your style of communicating? _____
10. Please list three examples of your leadership style: _____
11. How would others describe your leadership style? _____
12. What is your definition of leadership? _____

13. Please list three examples of situations where you have demonstrated leadership: _____

14. Do you believe you can build and lead a 250+ agent, dominant real estate company in your area successfully and profitably? ☐ Yes ☐ No Why: _____

15. Have you managed a "start-up" real estate company? ☐ Yes ☐ No
If so, please describe: _____

16. Are you willing to commit a minimum of three to five years to building a real estate company? ☐ Yes ☐ No

17. Why are you the best candidate to own a KELLER WILLIAMS REALTY Market Center in your selected territory? _____

Operating Principal Signature

Date: _____

Regional Director Signature

Date: _____

Section 3
**Multiple Market Center Application
(for existing OP's, TL's and applicable
investors)**

- **MMC criteria applies if: (i) the proposed Operating Principal is currently the Operating Principal or Team Leader of an existing Market Center; or (ii) any investor with 15% or more of the outstanding equity interests in the proposed new Market Center also owns a 15% or greater equity interest in another Market Center.**
- **If prior approval has not been given, please insert completed Multiple Market Center Application here.**

NOTE: THE CURRENT REGIONAL DIRECTOR MUST HAVE VALIDATED AN EXISTING OP'S AVA PRIOR TO SUBMISSION OF AN APPLICATION FOR ANOTHER MARKET CENTER.

NOTE: Ideally, the MMC investor has been approved by the Region and KWRI PRIOR to the submission of this application. If so, please include a copy of the approval statement for each.

KW Multiple Market Center Ownership Criteria

In order to ensure the continuing growth and performance of Keller Williams Realty, and to avoid overextended leadership, we have established the following criteria and other considerations for Multiple-Market Center Ownership. **These criteria apply to individuals with 15 percent or greater investment in multiple Market Centers, to leadership roles in multiple Market Centers, to identical ownership groups in multiple Market Centers, and in any other situation which KWRI determines it to be questionable to the system.**

General Criteria

Note: Find current Multiple Market Center application located on the Regional Intranet.

1. The Market Center(s) with common leadership/investors must be in 100 percent contractual compliance with the License Agreement, KWRI policies, guidelines, and cultural standards.
2. The common Market Center(s) must be consistently profitable and profitable year to date.
3. Proof of Capital must be provided in an amount sufficient to support the current Market Center(s) and the new application.
4. Follow the model. Have an OP, TL, MCA, Technology Coordinator, and functional ALC in each existing Market Center.
5. Be in culture. No recruiting complaints from neighboring Market Centers, effective team player, etc.
6. Operating Principals and Team Leaders are in MAPS Mastermind and Coaching and on track to be fully trained.
7. Market Centers must be exceeding goals and in the top 25 percent of each phase of growth (e.g., Launch, Growth, Achievement).
8. The productivity base for agents is in the top quartile of all MCs.
9. Require disclosure upon initial inquiry to your “home” Regional Leadership if proposed new Market Center is located outside of the applicant’s “Home Region.”
10. All owners and staff in the Market Centers must be current with their FSO attendance obligations.

General Manager

A General Manager may be required by KWRI for any Operating Principal of more than 2 Market Centers. A proposal for a General Manager candidate, whether required by KWRI or at the election of the Market Center(s), must be accompanied by the Region's approval and validated Recruit-Select for the proposed GM. The Operating Principal and GM should be the same for all offices requested for multiple GM roles. To be approved, a General Manager candidate must meet the criteria for a Multiple Market Center Operating Principal, and like other leadership roles within the same Market Center, no GM who has a familial relationship or other connection that would inhibit full accountability will be approved by KWRI.

Other Considerations

1. The applicant's ability to recruit 10+ million Mega Agents.
2. The applicant's attendance at KWU training on an ongoing basis.
3. The applicants' track record that current AVA and Recruit-Select requirements and Action Training are in place in all Market Centers.
4. The applicant's support of Keller Williams Family Reunion, Mega Camp, Masterminds, and other KWRI and Regional training events.
5. The agent count, overall profitability and financial stability of the applicant's Market Centers.

Note: KWRI reserves the right to approve or disapprove candidates based on these criteria and other considerations.

Success Plans

If a proposed Multiple Market Center candidate has embraced the Keller Williams systems, models, and culture, but his/her track record of success in all Market Centers is unclear, KWRI may approve the candidate conditioned upon performance under a Success Plan. The standard Success Plan lasts six months, allowing the candidate one month to ramp up, then meet established growth, profit, and leadership commitments throughout the remaining five months. The standard Success Plan structure for Multiple Market Center candidates is as follows:

- Growth: Each existing Market Center must cumulatively net 15 new agents by [the end of MONTH 6]; the new Market Center must transmit with a minimum of 40 agents and average 5 net agents for the subsequent months through [MONTH 6];
- Profit: Each existing Market Center must increase owner profit by 15% cumulatively for the months of [MONTH 2] through [MONTH 6], as compared to the same timeframe in the prior year, and Profit Share at appropriate levels; the new Market Center must be cumulatively profitable from its first transmittal through [MONTH 6];
- Leadership: OP and his/her leadership teams (for all new and existing Market Centers) must participate in all applicable Regional and International calls and events, and must register and participate in Mastery Coaching through KW MAPS Coaching.
- Compliance: The existing Market Centers must resolve the following defaults/compliance issues:

Critical to this process is that the candidate clearly understands and commits to these standards. Once a candidate does agree to this process, KWRI will document these commitments in writing. If the candidate is then unable to meet the growth, profit, and leadership commitments and resolve any applicable compliance issues, the Market Center must find and submit for approval a new Operating Principal to lead the Market Center moving forward.

Section 4
Authorization to Proceed
(PLEASE INSERT THE ATP PACKAGE APPROVED BY THE
REGION FOR THESE SECTIONS / 4A – 4J)

To: _____, Regional Director
From: _____, Proposed Operating Principal
Proposed MC Name: _____

This is our formal request to open a Market Center within the _____ Region. We are including for your review the following documents, as we believe that we have met all the required criteria. Attached please find the following:

- 4A – Market Research – Independent Territory Data
- 4B – Territory Map and Description
- 4C – Territory Data Summary
- 4D – Territory Analysis
- 4E – Competitive Analysis
- 4F – Investor Breakdown
- 4G – Financial Statements
- 4H – Core Group
 - Opening Strength Worksheet
 - Agent Profiles & Commitment Letters
- 4I – Forecast Model
- 4J – Operating Budget

We understand that the Region will review the request, in addition to the attached information, and respond to us within 30 days from the date received. Upon approval we will then begin our formal application process. We look forward to a favorable reply.

Respectfully Submitted,

Proposed Operating Principal (signature)

Reply—From The Region:

- ☐ **Approves the Request**—Contact the Regional Director for the Market Center Application Package.
- ☐ **Request Denied**—Please note the conditions and reasons for the denial. Submit a **FULL PACKAGE** with the corrections noted. Partial packages or replacement documents will not be accepted.

Regional Director

Date

Section 4A

Market Research – Independent Territory Data

- Access statistical data from a third party source and ask for a breakdown according to the requirements. Include single, multi-family and condos/townhomes.



- Leon D’Ancona with IMS, Inc. at (This company can also access Canadian data)
- Mark Spraeztz with Terradatum, Inc. at EXT.1 (U.S.)

- Independent Territory Data must include the following:

Instruction:

A unit reflects one transaction, a single property bought and sold, not buy and sell sides of one transaction.

Note:

KWRI may approve the grant or operation of a Strategic Market Center in a distinct market that has fewer than 1,000 closed units and 500 associates. Depending on the potential production in the market, KWRI may not enforce the standard GCI requirements and may allow for modified leadership requirements.

Agent Analysis—number of agents who office or reside within the territory (**MODEL AGENT COUNT = 500 Agents**).

Transactions—units sold within the territory within the past 12 months, including total volume, units and average sales price (**MODEL UNIT COUNT = 1,000 Units**).

Office Analysis—a listing of all the offices in sales volume order within the proposed territory. The analysis should include: the number of agents at each office, phone, address and sales volume.

Independent Territory Data should be consistent with the data reflected in the Territory Data Summary (Section 4C).

Market Research (4A – 4E) is the most time-consuming portion of the process, but it is a crucial element of your due diligence. To complete this section you must fully evaluate the proposed territory and local competition. This will help you to determine the appropriate territory, value proposition, Company Dollar cap, fees, etc., for the proposed Market Center. This section may require 2-3 people to complete.

Section 4B

Territory Map & Description

- Include a printed map from an on-line service or software that clearly indicates the proposed Awarded Area along with a detailed description of the territory from starting point, back to point of origin. The street names on the map must be visible and clear. The outlines should more or less create a complete circle indicating a distinctive market area with the proposed Market Center location generally at the center of the territory. Your Region can provide you with information regarding access to a computerized map, if you do not already have access to one.
- Each map must fit on an 8 ½" x 11 piece of paper.
- The street boundaries must match the written description on the File Data Sheet.
- The territory should meet the model unit count (1,000) and agent count (500) requirements.
- The Regional Director and Operating Principal must sign and date the attached map.

Section 4C

Territory Data Summary

Complete the table below for the proposed territory.

MLS Area or Zip / Postal Code	Number of Closed Units	Average Sales Price	Closed Sales Volume
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
TOTAL		\$	\$

Number of Agents in proposed territory

Number of competitive real estate firms in the proposed territory

Instruction:

Ensure that the totals for number of closed units and agents in the proposed territory match the Independent Territory Data submitted with the application.

nts in the
endent

Section 4D

Territory Analysis

TERRITORY ANALYSIS

1. How many licensed residential Realtors® are active in your local Board of Realtors®/MLS
 - a. In the city? _____
 - b. In the proposed territory? _____
(Should match Territory Summary and Independent Territory Data)
2. How many commercial associates are active in your local area?
 - a. In the city? _____
 - b. In the proposed territory? _____
3. What is the Single/Double (circle one) Count closed volume?
 - a. In the city? _____
 - b. In the proposed territory? _____

Section 4D

Territory Analysis

TERRITORY ANALYSIS

A POPULATION

- 1) What is the approximate current population? _____
- 2) What is the 5-year projected population? _____

B DIVERSIFICATION

What is the percentage of the dwellings for sale in the market for:

- 1) Single family? _____
- 2) Condominium? _____
- 3) Multifamily? _____
- 4) New home? _____

C MARKET TRENDS

How many transactions CLOSED and at what volumes over the last five years?

	# of Transactions	Sales Volume
Five years ago		
Three years ago		
Last year		

Section 4E

Competitive Analysis

COMPETITION

Research the top 5 residential real estate companies in the territory

Company Name	Broker/Manager Name	# of Offices	# of Agents	Volume	Active Listings
1.					
2.					
3.					
4.					
5.					

Section 4E

Competitive Analysis

Describe the market, competition, strengths, weaknesses and competitive advantages.

Company/Market Position:

Strengths/Weaknesses:

Advantages/Disadvantages:

Presence/Market Share/Image:

Office/Training:

Transaction, Start-up & Other Costs:

*Attach photo of office exterior
One page per competitor
(Duplicate this sheet)*

Section 4E

Competitive Analysis

COMPETITIVE COMPENSATION

Agent Dollar							
Volume	GCI	#1 CO	#2 CO	#3 CO	#4 CO	#5 CO	KW
\$1M	\$30,000						
\$2M	\$60,000						
\$3M	\$90,000						
\$4M	\$120,000						
\$5M	\$150,000						
Company Dollar							
\$1M	\$30,000						
\$2M	\$60,000						
\$3M	\$90,000						
\$4M	\$120,000						
\$5M	\$150,000						
Royalty							
\$1M	\$30,000						
\$2M	\$60,000						
\$3M	\$90,000						
\$4M	\$120,000						
\$5M	\$150,000						

Instruction:

Proposed Company Dollar Cap should be slightly lower than the #1 or #2 competitor's Company Dollar in the Capper "sweet spot."
If not, provide a clear rationale for the proposed Cap.

Section 4E

Competitive Analysis

PROPOSED COMPETITIVE COMPENSATION

Commission Split(s):



Commission Split Cap:



Franchise Royalty Cap:



REMEMBER:
Franchise Royalty is never waived.

NOTE: KWRI relies on this information, and the budget provided in Section 4J, in consideration of this application. Any proposed change to either must be submitted to the Region and KWRI for review and consideration.

Section 4G

Financial Statements

- All investors with equity interests of **20%** or more in the Market Center must include a Financial Statement. Be specific, as if you were applying for a large commercial loan.
 - You may submit in a form of your choice, but it should contain all of the information requested in the attached Keller Williams Financial Statement form and should be acceptable to a bank or financial group.
-
- ☐ Financial Statements have been submitted by all investors with 20% or more equity interest
 - ☐ Each Financial Statement submitted has been signed and dated and is current (within the past 6 months)

**KELLER WILLIAMS REALTY, INC.
FINANCIAL STATEMENT**

Name: _____

Address: _____

The following information must be provided in connection with the Keller Williams Realty, Inc. evaluation of your application. Please complete the information below, responding to each item as fully as possible. KWRI will be relying on this information, in part, while determining whether the applicant meets the qualifications. **NOTE: Must be signed and dated on last page**

ASSETS		LIABILITIES	
Cash on hand in Banks		Notes payable to banks - Secured	
Government Securities - see schedule		Notes payable to banks - Unsecured	
Listed Securities - see schedule		Notes payable to relatives	
Unlisted Securities - see schedule		Notes payable to others	
Accounts and Notes Receivable Due from relatives and friends		Accounts and bills due	
Accounts and Notes Receivable Due from others – good		Other unpaid taxes and interest	
Accounts and notes Receivable - Doubtful		Real Estate Mortgages payable - see schedule	
Real Estate owned - see schedule		Chattel Mortgages and other Liens payable	
Cash Value - Life Insurance		Other debts – itemize	
Automobiles			
Personal Property			
Other assets - itemize			
		TOTAL LIABILITIES	
		NET WORTH	
TOTAL ASSETS		TOTAL LIAB. & NET WORTH	

SOURCES OF INCOME		PERSONAL INFORMATION	
Salary		Business Occupation?	Age
Bonus and Commissions		Length of Employment?	
Dividends			
Real Estate Commissions		Partner or officer in any other venture?	
Other Income - Itemize			
Interest Income		Children?	
		Dependents?	
TOTAL			

CONTINGENT LIABILITIES		GENERAL INFORMATION	
As endorser, co-maker or guarantor		Are any assets pledged? (If yes, please describe)	
On leases or contracts		Are you defendant in any lawsuits or legal actions (If yes, please attach supporting information):	
Legal claims		Personal Bank Accounts carried at:	
Provision for Federal Income Taxes		Have you ever filed bankruptcy? (If yes, please attach brief explanation)	
Other special debt			

SCHEDULE OF GOVERNMENT STOCKS AND BONDS OWNED			
No. of shares or Face Value (Bonds)	Description	In name of	Market Value

Instruction:
Must be completed in full.

SCHEDULE OF REAL ESTATE OWNED

Description of Property, Located and Size of Land	Date Acquired	Title in Name of	Cost	Market Value	Mortgage Amount	Mortgage Terms

SCHEDULE OF NOTES PAYABLE

Name of Creditor	Original Amount	Unpaid Balance	Payment Terms	Collateral-Endorser

**SCHEDULE OF LIFE INSURANCE CARRIED, INCLUDE NSLI AND
GROUP INSURANCE**

Amount	Name of Company	Beneficiary	Cash Surrender Value	Loans

CREDIT REFERENCES

The undersigned certifies that all pages hereof and the information inserted herein has been carefully read and is true and correct.

Signature: _____

Date: _____

Section 4H

Core Group

- Please complete and insert:
 1. Opening Strength Worksheet
 2. Core Agent Profiles
 3. Core Group Commitment Letters
- Include a signed Letter of Commitment for each associate in the Core Group.
- Unless set to a higher standard by your Region, the Core Group must include a minimum of 20 associates. Twelve of those 20 associates must be Cappers (not Cap Equivalents). Of the 20 associates, 5 must be Icons.
- If production does not back up Icon status, include articles from publications, awards won, etc. You must back up the assertion that an associate is an Icon.
- If any associate is transferring from any Keller Williams office, a letter from the OP of that office must be attached indicating approval of transfer.

NOTE: KWRI expects all new Market Centers to transmit initially with a minimum of 40 associates.

Section 4H

Opening Strength Worksheet

In the spaces below, list all Associates who will be providing Company Dollar to the Market Center.

Associate Name	Current Company*	Current Production	Market Center Cap	Rating A - Capper B - ½ Capper C - ¼ Capper	Start-up Year Anticipated Company Dollar Contribution

TOTAL PROJECTED MARKET CENTER COMPANY \$ (for Start-up Year)	\$
LESS: MC PROPOSED OPERATING BUDGET	\$
MARKET CENTER PROJECTED PROFIT	\$

Operating Principal _____

Date _____

Regional Director _____

Date _____

Instruction:
Should be consistent with
Initial Budget (Section 4J)

* All Associates not incubating will need to sign and include a commitment letter. All incubating agents will need to have the OP of that Market Center provide an acknowledgment of transfer letter*

Section 4H

Core Agent Profile Form

Name	
Company	
Number of Years in Real Estate	
Recent Annual Volume	
Highest Career Volume	
Team Members (if applicable)	
Team Structure (if applicable)	
Provide a situation where this agent demonstrated strong ethical standards.	
Give an example of how this agent has influence among other agents.	
What is the current listing inventory for this agent?(units & volume)	
Provide an example of how this agent is viewed as a team player by peers.	
How is this agent learning based?	
How does this agent have the ability to recruit others to the Market Center?	
How will this agent demonstrate "team building" and share their knowledge with others at the Market Center?	
How will this agent fully embrace the Keller Williams model, values, beliefs and concepts?	

Section 4H
**Letter of Commitment
(Sample)**

CONFIDENTIAL

**Keller Williams Realty
(Name) Region
Letter of Commitment**

Please accept this letter as my commitment to join the Keller Williams Realty
_____ Market Center upon opening.

To demonstrate my commitment, I plan to invest \$_____ as an investor to establish the required capital needed to apply for and open this Market Center (if applicable).

I understand that my commitment to join the Keller Williams Realty
_____ Market Center is to be kept in the strictest of confidence. I will be informed of the progress of this project by the Operating Principal, _____, including but not limited to, other investors, application process, office location, investor meetings, and other important dates.

I am excited to be offered this opportunity and look forward to helping this Market Center become the dominant real estate office in our community.

Signature

Date

Print Name

I accept your letter of commitment and agree to its confidentiality promise.

Signature of Operating Principal

Date

Section 4H
**Letter of Confidentiality
(Sample)**



Letter of Confidentiality

I, _____ am participating in an informational meeting about joining Keller Williams Realty. I agree that I will not divulge the name(s) of the other participants who attend this meeting. I agree to hold all of the name(s) in confidentiality and will neither divulge nor do anything to harm in any way any of the other participant's business relationships with clients, customers, brokers, fellow agents or the real estate company with which they are currently affiliated.


Signature

Date

Section 4I

Initial Forecast

- Complete the Forecast Model, which your Region will provide.
- Submit **ONLY** the Executive Summary.



Instruction:
Forecast Model found on the
Regional Intranet

The KW Forecast Model

The KW Forecast Model is a spreadsheet designed to help a prospective OP project their Market Center's business. The Forecast Model is used to enter key Market Center goals in the MORE System where they are tracked. The Forecast Model is available on the Regional Intranet.

Forecast Model Executive Summary (Sample)

2015 Forecasting Executive Summary Greater Rochester 820			
Financial Metrics			
Net Profit Year End	\$167,950.27	Royalty Paid Year End	\$102,698.55
Profit Sharing Year End	\$122,709.74	GCI Year End	\$2,534,244.31
Company Dollar Year End	\$642,306.08	Operating Expense Year End	\$423,896.06
Other Income Year End	\$77,250.00		
Production Metrics			
Agent Count Year End	100	Average Closed Price	\$136,544.00
New Listings Taken Year End	430	Average Commission Rate	2.51%
Written Units Year End	852		
Closed Units Year End	736		
Key Forecasting Metrics			
Your Market Center Metrics for 2015			
Company Dollar Percent of Total Income	21.89%		
KW Approved Costs Percent of Company Dollar	54.75%		
Rent Cost Percent of Company Dollar	12.11%		
Bonuses Percent of Company Dollar	3.74%		
Grand Total Operating Expenses Percent of Company Dollar	66%		
Desk Fees Percent of Rent	30.09%		

Section 4J
Initial Budget

- Submit the initial annual budget for review and formal approval by the Regional Director, using the following template.

- Initial budgeted gross monthly expenses, less Other Income (KW Approved Costs), may not exceed \$25,000 at application.

Section 4J

Initial Budget Template

Operation Expenses		Example	Actual
6-1000:6-1009	Accounting/Tax Preparation	150.00	
6-1510:6-1519	Advertising – Classified	400.00	
6-1520:6-1529	Advertising -Other Marketing	250.00	
6-1700:6-1709	Auto Expense	25.00	
6-1900:6-1909	Bank Charges	10.00	
6-2000:6-2009	Computer Software – Office	250.00	
6-2100:6-2109	Contest & Sales Awards	100.00	
6-2300:6-2309	Contract Labor/Consulting	200.00	
6-2600:6-2609	Contribution/Gifts	50.00	
6-2800:6-2809	Copy Machine/Copying Expense	350.00	
6-3010:6-3019	Dues/Subscriptions	75.00	
6-3020:6-3029	Dues/MLS	75.00	
6-3030:6-3039	Dues/BOR	70.00	
6-3040:6-3049	Dues/Other	100.00	
6-4000:6-4009	Depreciation/Amortization	1000.00	
6-4611:6-4620	Insurance – Office/Other	250.00	
6-4700:6-4709	Interest Expense	50.00	
6-4750:6-4759	KW Convention		
6-4800:6-4809	Legal Expenses	50.00	
6-5010:6-5019	On line services-Credit Reports		
6-5020:6-5029	On line services-MLS	100.00	
6-5030:6-5039	On line services-Tax Service	70.00	
6-5040:6-5049	On line services-Internet	175.00	
6-5500:6-5509	Maintenance/Repair-Copy Mach	200.00	
6-5510:6-5519	Maintenance/Repair-Phone Sys	100.00	
6-5520:6-5529	Maintenance/Repair-Computer	200.00	
6-5530:6-5539	Maintenance/Repair-Other	25.00	
6-5570:6-5579	Meals		
6-5580:6-5589	Meetings		
6-5590:6-5599	Printing-Out of House(OFFICE)	100.00	
6-6000:6-6009	Postage/Freight/Delivery	175.00	
6-6010:6-6019	Public Relations		
6-6100:6-6109	Recruiting Incentives		
6-6210:6-6219	Rent - Office/Occupancy	3000.00	
6-6220:6-6229	Rent – Other		
6-6230:6-6239	Rent – Equipment		
6-6510:6-6519	Salaries - Admin./Staff	5000.00	
6-6520:6-6529	Salaries - Admin./Bonus		
6-6530:6-6539	Salaries - Call Coordinator		
6-6540:6-6549	Salaries - Team Leader	5000.00	
6-6550:6-6569	Salaries – Team Leader Bonus		
6-6560:6-6579	Payroll Service Fees		
6-6610:6-6619	Signs		
6-7010:6-7019	Supplies	500.00	

Operation Expenses (continued)		Example	Actual
6-8000:6-8009	Taxes – Payroll	855.00	
6-8040:6-8049	Taxes - Federal Income		
6-8100:6-8109	Taxes – Property		
6-8140:6-8149	Taxes - State/Provincial Income		
6-9010:6-9019	Telephone Service		
6-9020:6-9029	Telephone - Long Distance	200.00	
6-9030:6-9039	Telephone – Auto		
6-9100:6-9109	Training - Consultants/KWConnect	625.00	
6-9120:6-9129	Travel	350.00	
6-9130	KW Debt Allowance		
6-9180	Salaries - Designated On Site Broker		
6-9600	Mortgage Company Flat Fee		
6-9610	Closing Entity Flat Fee		
6-9620	Home Warranty Flat Fee		
6-9630	Insurance Company Flat Fee		
TOTAL	Gross Monthly Market Center Exp	\$20,130.00	
LESS	Other Income		
8-0010	Other Income - Desk Fees	800.00	
8-0020:8-0030	Other Income – Copier – B&W/Color	250.00	
8-0060	Other Income – E & O Insurance		
8-0070	Other Income – KW Connect Sponsorship	500.00	
8-0070:8-0150	Other Income – Miscellaneous		
8-7010-7040	Mortgage Revenue – JV/MSA/Desk Fee		
8-7050-7080	Closing Entity – JV/MSA/Desk Fee		
8-7090-7120	Home Warranty Revenue – JV/MSA/Desk Fee		
8-7130:8-7160	Insurance Revenue – JV/MSA/Desk Fee		
TOTAL	KW APPROVED COSTS	\$18,580.00	
	NOTE: Must be under \$25,000		

Operating Principal _____

_____ Date

Regional Director _____

_____ Date

Instruction:

Should be consistent with
Opening Strength Worksheet
(Section 4H)

NOTE: This is an initial budget. Once your Market Center is approved and you have received your Market Center accounting software you should ensure that all revenue and expenses are booked according to the Keller Williams Realty Chart of Accounts.

Section 5

Initial Capitalization

- Include a statement/letter from the bank listing account name(s), number(s) and balance(s). Show proof of the required capitalization amount (minimum \$150,000 in the form of cash only) specified by the Regional Director, as appropriate for your geographic area.
- NOTE: We suggest you choose a bank closely located to the Market Center. Staff may make daily trips to the bank and location will be a priority. Set up bank accounts depending on local state/provincial regulations. Possibly Capital (or Depository), Commission, Operating and Trust/Escrow.
- Initial capital should be held in the name of applicant entity.

Section 6

License Fee

- Include a check for the \$25,000 License Fee made payable to Keller Williams Realty, Inc. to KWRI:

Instruction:

Check should be paid from the proposed licensee entity's bank account.

- We intend to deposit your initial license fee upon receipt and we will earn interest for our own account on this initial license fee while we evaluate your application for the proposed license. By signing this form you acknowledge that our deposit of the initial License Fee will not be deemed acceptance of your application or our agreement to grant you a franchise. A franchise can only be granted pursuant to our executing the License Agreement and related documents following the evaluation of your application and any other information you may be required to submit for that purpose.

Operating Principal

Date

Section 7

Licensee Entity Documents

Include the following (as appropriate):

- Copy of corporate formation document as filed with the correct state/provincial body
- Letter from the proposed OP stating that the entity has not conducted business since its formation
- Registration of Trade Name or dba (Keller Williams Realty) with the proper body in your state or province (if required)
- Confirmation documents indicating Tax ID or EIN number
- Copy of current Operating Agreement, Bylaws or Partnership Agreement (with provisions consistent with the Licensee's obligations under the License Agreement).

Instruction:

Proposed Licensee entity must be newly-formed specifically to operate the new Market Center.

- **NOTE:** Sample Language to address the Required Provisions, and additional items to consider, are provided in the following pages. Please provide your counsel with this information as soon as you receive it to avoid costly expedited legal review and delays in the processing of your application. The proposed entity may not have "KW", "Keller Williams", "Keller Williams Realty" or any other KWRI trademark in its legal business name.

Section 7A

**Sample Language
for Required Provisions**

SAMPLE ONLY

The language following is intended as a sample for reference purposes only, and is not intended as legal advice. You are not required to use this specific language, and should consult your own attorney regarding our requirements and your entity documents. Please note that any use of all or a portion of the sample language is at your sole risk, and we make no representations or warranties regarding the sample language. You are solely responsible for confirming that any use of such sample language is consistent with the other provisions in your entity documents.

In order to conform to the requirements of Keller Williams Realty, Inc. ("KWRI") as set forth in the License Agreement dated _____ by and between KWRI, as Licensor, and the Company as Licensee (the "**License Agreement**"), the Company shall take the following actions and/or make the following requirements:

1. Definition of Operating Principal. Operating Principal shall mean an individual who is a [Member] [Shareholder] [Partner] designated by the Company and approved by KWRI to serve as the Company's Operating Principal.

2. Designation of Operating Principal. The Company shall designate and retain an individual to serve as Operating Principal of the Keller Williams Realty - _____ Market Center, as defined in the License Agreement (the "**Market Center**"). The Operating Principal shall meet the qualifications and criteria established in the License Agreement and Manuals ("**Manuals**") and shall be acceptable to KWRI. Unless otherwise approved in writing by KWRI, the Operating Principal shall devote his or her substantial energy and best efforts to the supervision and operation of the Market Center. Unless the Company has otherwise secured the services of a

real estate broker, the Operating Principal shall be a real estate broker, licensed under the laws of the [State] [Province] of _____.

3. Authority to Vote and Control. Notwithstanding anything in this Operating Agreement to the contrary, the Operating Principal shall at all times possess the authority to vote and control not less than fifty one percent (51%) of the voting interests in the Company, either through ownership of equity interests in the Company, by contract, or through irrevocable proxy.

4. Principal Officer. The Operating Principal shall be the Company's principal officer and shall be fully authorized without further approval of the [Members] [Shareholders] [Partners] to take or omit to take any action that Company is required to take or forebear under the License Agreement.

5. Ownership. The Operating Principal shall, at all times, directly or indirectly, own at least twenty percent (20%) of the ownership interests in the Company.

6. Option to Reacquire Interest. The Company maintains an option to acquire the Operating Principal's ownership interest in the Company upon the Operating Principal's resignation or discharge from the Company, disability or death, with the result that any successor Operating Principal can satisfy the equity and control requirements of the License Agreement.

Note: In lieu of the Company having the option to acquire the OP's ownership interests, KWRI may approve an alternate mechanism for the redemption or reserve of ownership interests in the Company that will ensure that the Company can provide a new OP with the required minimal 20% interest

7. Sole Purpose. The sole and exclusive purpose of the Company is to operate a Keller Williams Realty Market Center, providing real estate brokerage and such ancillary real estate services and products as are permitted by the License Agreement. The Company may not engage in any other business or acquire property unrelated to its purpose unless the Company's engagement in that business or acquisition of that property is approved in accordance with the Company's governing documents and in compliance with the License Agreement.

8. Conflict Resolution. The License Agreement may contain provisions that impose other or additional requirements on the Company or its [Members] [Shareholders] [Partners]. In case of conflict, between the

License Agreement and this Operating Agreement, the provisions of the License Agreement will govern and control the conflict's resolution, so long as the interpretation does not violate applicable law.

9. KWRI Consent to Transfer / Right of First Refusal. Pursuant to the terms of the License Agreement, neither the Company nor any successor to any part of the Company's interest in the License Agreement, nor any [Member] [Shareholder] [Partner] that directly or indirectly owns an interest in the Company, shall sell, assign, transfer, convey, give away, pledge, mortgage or otherwise encumber any direct or indirect interest in the License Agreement, in the Market Center or in the Company without KWRI's prior written consent. Further, pursuant to the terms of the License Agreement, KWRI has the first right of refusal on a proposed sale or transfer of any interests in the Company.

10. Non-Competition; Surrender of Ownership Interests. Any [Member] [Shareholder] [Partner] of the Company who purchases, maintains, operates, engages in, or has any interest in any real estate business or coaching or consulting business that supports real estate agents that competes directly with KWRI, including any real estate business that involves (i) the real estate brokerage business; or (ii) the offer, sale or operational support of businesses in the real estate brokerage business (whether as a franchisor, licensor, regional representative, area director, consultant, coach or other similar service provider capacity); or who affiliates with a non-Keller Williams company that diverts or attempts to divert any business or customer of any Market Center to any competitor, or to a competitor of KWRI's MAPS Coaching Division, KW Commercial Division, KW Luxury Homes Division or any party approved by KWRI to provide approved services to customers of Keller Williams Realty Market Centers by direct or indirect inducement or otherwise, must promptly transfer his or her interests in the Company according to the buy-sell provisions described in this Agreement in order to comply with the non-competition provisions in the License Agreement.

***Note: You should review and consider the buy-sell provisions in your corporate documents and discuss them with your ownership group.**

OTHER ISSUES FOR CONSIDERATION

We have received feedback regarding additional considerations that a Market Center should ideally address in its governing documents in order to prevent possible future conflicts among the Market Center's owners/investors that could have been avoided. We encourage you to discuss these topics with the Market Center's counsel to ensure that they are addressed to your satisfaction:

1. Are the expectations of owners/investors established and documented with respect to participation in training and other licensing requirements. If there is a limited voting role for "non-liability" owners/investors (if any), do the corporate documents establish the expectations of these "non-liability" owners/investors under the License Agreement?
2. What is the process for establishing "cash calls"? What happens to the ownership interests of an owner/investor that does not meet cash calls?
3. What is the method of valuation of ownership interests that are offered for sale by owners/investors, including interests that are required to be sold by non-performing or non-compliant owners/investors?
4. Following KWRI's right of first refusal, who has the successive rights to purchase ownership interests that are offered for sale, and what are the valuation rules for these ownership interests?
5. Are valuation methods and terms of sale for "voluntary" offers of ownership the same as those for "involuntary" offers of ownership?
6. How are ownership interests treated upon retirement or death of an owner/investor?
7. How will the company treat a repurchase of ownership interests? Are these interests held in reserve or distributed to existing owners/investors?

8. Can the Market Center remove its OP for non-performance? If so, how? What are the criteria for removal, and how is it accomplished?
9. How are the OP's ownership interests treated upon his/her death, disability, resignation and termination? Is he/she able to retain all or a portion of owned or earned interests in the company?
10. In the event of an OP change, how does the Market Center ensure that the new OP acquires the 20% in ownership interest required under the License Agreement. (All from the former OP? Ratably from all owners/investors? Some other method/formula?)
11. What is required to amend the company's governing documents? Are all owners/investors required to approve any amendment or a certain type of amendment?
12. Does the Market Center require a tax referral from a CPA (U.S) or CA (Canada) prior to any ownership transfer or repurchase?

Section 8

Licenses, Memberships & Insurance

- Verify you have all of the licenses necessary to run and protect a real estate office in your state/province.
- Some memberships cannot be obtained until you are licensed with KWRI and/or your state/province or municipality. However, all applications should be ready to submit at the earliest opportunity.
- Contact each office and include copies of the forms listed below. The forms do not need to be completely filled out and should be sent in to the pertinent office only after the application has been approved.
 - State/Provincial Real Estate Commission Application
 - Local Real Estate Board Application
 - Application for MLS Service
 - County and/or City Business License
- The following will be obtained upon approval of the Market Center Application:
 - ☐ Comprehensive General Liability (which names KWRI as additional insured)
 - ☐ Auto Liability (for non-owned and hired autos) – which names KWRI as additional insured
 - ☐ E&O Insurance (which names KWRI as additional insured)
 - ☐ Workers Compensation

Operating Principal

Date

Regional Director

Date

Section 9

Consultants and Service Providers

Certified Public Accountant (US) / Certified Accountant (Canada)

- Clarify the Accountant's charges and billing for services, and that they understand Keller Williams's accounting systems, which are different/non-standard. Please attach:
 - Letter to Accountant Requesting Services
 - Response from Accountant Accepting Services
 - Accountant's Résumé

Computer/Internet Consultant

- Clarify the Consultant's charges and billing for services. Please attach:
 - Letter to Consultant Requesting Services and providing Keller Williams Realty Technology Standards
 - Response from Consultant Accepting Services
 - Résumé
 - Acknowledgement regarding eEdge coordination

Interior Designer/Planner

- Clarify the decorator's billing and charges for services. Request a list of clients or references.
- The Operating Principal must tour (preferably with the decorator) another Market Center. Complete the Market Center Site Approval form provided.

Notes

Section 9A

eEdge Coordination

Upon final approval and execution by KWRI, you will begin to program and load local forms into the myTransactions solution in eEdge.

KWRI and its vendor(s) require the cooperation of the new Market Center's leadership and staff to obtain, program and load these forms. This process may take up to 30 days.

In order to expedite this process, we strongly suggest that you immediately begin to compile these forms.

Your Region can help to clarify any questions you might have.

Acknowledged:

Operating Principal

Date

Regional Director

Date

Proposed Market Center Space and Equipment

Lease Negotiations

Your prospect has attended FSO and is using the Launch Manual to determine space needs. They should never sign a lease until they have had all of their questions answered. Remember not to provide advice. It is up to their attorney to do that.

You should expect the following:

1. A completed building information worksheet (from the Launch Manual)
2. A professional decorator. Insist on seeing a decorator board. KWRI recommends they contact Keller Williams' Space Planner Consultant:
Kara Copeland
Real Office Solutions, Inc.
1-800-665-8870
3. Associate rent has been calculated to include:
 - Utilities
 - Yard Maintenance/Cleaning
 - Office Cleaning
 - General Comprehensive Liability

Section 9B

Proposed Site Approval

I have provided the following information to the Regional Director, with the intent of providing a world class customer experience for the Market Center's clients and associates:

- 1. Photographs of the interior and exterior**
- 2. Paint chips, fabric swatches, photographs of furniture, etc.**
- 3. Technology Plans—wireless office, phone systems, software, computers and other office equipment**

Respectfully Submitted,

Operating Principal

Acknowledged by:

Regional Director

Date: _____

Pledges

- Regional Leadership Manual – v1114.1 © 2014 Keller Williams Realty, Inc.

Section 10

Review & Submit

- Ensure all documents are included and in order.
- Review carefully for any errors or omissions.
- If further explanation is needed, please include a note.
- Applications are only submitted to KWRI by the Region. Please do not forward these directly to KWRI as they require Regional review, recommendation and signatures.
- Thank you

Finalize and Submit to KWRI

Application Coordinator—Independent Contractor(s)

1. The applicant may choose to hire an application coordinator and pay the application coordinator's fee.
2. The coordinator will track and compile the information to ensure submission of a complete application.
3. **The Market Center applicant is responsible for the accuracy of any and all information provided in the application.**
4. Upon completion, a copy is sent to KWRI, Attn: Legal/Commitment Department.

Note: Regional Director must always review and sign where appropriate prior to submission.

KWRI knows of one independent contractor currently providing these services:

Kathleen Bronstad

Phone: 817-594-9535

Email: Kathleen@bronstadconsulting.com

Website: www.bronstadconsulting.com

Once Approved by KWRI

Once an application has been approved, KWRI forwards two copies of the License Agreement to the OP candidate for signature. Correspondence with the new agreements also addresses:

1. Training requirements
2. Required holding period before the agreements can be signed; and
3. Other information as applicable.

[DATE]

Via Federal Express

, Operating Principal
Keller Williams Realty –

Dear ,

Welcome to the Keller Williams Realty family! We are thrilled and honored that you've made the decision to build your business with us and are looking forward to a long and profitable relationship.

As you've likely already heard, Gary Keller describes Keller Williams Realty as a "training and coaching company that just happens to be in the real estate business." We know that our training and coaching, coupled with the models, systems and culture, will provide the very firmest foundation for you to build your business to new heights.

Leadership and Franchise Systems Training

The speed and trajectory with which your business will take off will be directly related to the time and effort you put into learning and implementing the KW models and systems. Remember, "speed of the leader, speed of the pack!" To that end, we've assembled a core curriculum of courses for you and your Market Center leadership to attend as soon as possible. Please also remember that all approvals are contingent upon attendance at the courses noted below.

The Keller Williams University courses and programs listed below have been paid for with your initial franchise fee. They may be taken an unlimited number of times within the first 18 months after your Market Center's launch; although, RSTLM courses have a minimal charge to cover third party subscription costs (as noted). Additionally, you have \$5,600 worth of MAPS Coaching included in the pre-paid training. All of the following must be taken within six months of your signed document date unless otherwise noted.

For Operating Principals and Team Leaders

- **Franchise Systems Orientation (FSO)**
- **OP Boot Camp and Recruiting Great Agents (for OP attendance)**
- **Recruiting Great Agents only (for TL attendance)**
- **RSTLM: Recruit Select (\$150 registration fee)**
- **RSTLM: Action Training (\$150 registration fee)**
- **RSTLM: Leadership & Motivation (\$150 registration fee)**
- **Keeping Agents First**
- **MAPS Coaching**

For Market Center Administrators

- **MCA Skills (18 online sessions – available through KW Connect)**
- **Franchise Systems Orientation (FSO)**
- **MCA Success in the Office**
- **MCA DRIVE**
- **RSTLM: Recruit Select (\$150 registration fee)**
- **90-day Financial Review**

[OP NAME]

[DATE]

Page 2

In addition to the above requirements, **all Market Center Investors must attend Franchise Systems Orientation (FSO) within 90 days of the date of this letter and every two years thereafter.**

Other Recommended Learning Opportunities

In addition, we recommend that your entire Market Center leadership team: Operating Principal, Team Leader and Market Center Administrator, attend the following courses within the first 18 months after your launch date. The registration for these classes is not covered by your franchise fees. Your course schedule must be designed and approved by your Regional Director, as well as Keller Williams Realty International, and includes the following classes and programs:

For Operating Principals and Team Leaders

- Market Center Financials
- ALC Clinic for ALC Members
- ALC Clinic for Leadership
- Owner or Team Leader Masterminds
- Mega Leadership Camp
- Train the Presenter
- Family Reunion

For Market Center Administrators

- Market Center Financials
- RSTLM: Action Training (\$150)
- RSTLM: Leadership & Motivation (\$150)
- ALC Clinic for ALC Members
- ALC Clinic for Leadership
- MCA Masterminds
- Mega Leadership Camp
- Family Reunion

To register for any of these courses and programs please go to mykw.kw.com and click on the education tab, or contact Keller Williams University at 512.327.3070.

License Agreement Documents

Enclosed, you will find two fully prepared License Agreements and a KWU Materials License Addendum for a new Market Center. Sign in all areas indicated and make sure you have your signatures witnessed on the "Agreement and Guaranty of Controlling Principals", which is Attachment A to the License Agreement. You will need to have a Notary Public notarize your signatures on the Powers of Attorney in the back of your License Agreement. Please also note Attachment C, the Electronic Debit Authorization form. This form must be filled out completely in order for your documents to be processed. We also need you to initial each page, front and back, of one of the License Agreements.

[You have reported that ___% of the ownership interests in the Licensee entity are currently unissued or held by the Licensee entity for future issuance. Please note that the enclosed License Agreements reflect each Principal's ownership interest as a percentage of the total interests actually issued.]

[OP NAME]

[DATE]

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Please remember that you must wait seven (7) calendar days after your receipt of these documents before signing them. Once all documents and the enclosed copy of this letter are signed, please return **all** documents to Keller Williams Realty, Inc., 1221 South Mopac Expressway, Ste. 400, Austin, TX 78746. Your Market Center number will be assigned when we receive your completed documents. We will sign both copies and return one original License Agreement to you for your records. Please call me at 512.439.8645 if you have any questions regarding these documents.

Market Center Support

Once your documents have been fully executed and we have issued your Market Center number, you should expect a call from our Franchise Support team to assist as you launch your Market Center.

Again, Welcome! This is an exciting step, and we look forward to counting you as a member of the Keller Williams family.

Sincerely,

Darrell King
Commitment Director

Agreed: _____

[OP NAME]

Enclosures

cc: [RD]

The MC Launch Process

Process		Tool/Resources
1	Action Train OPs.	<ul style="list-style-type: none"> • Regional Director • KWU: http://kellerwilliamsuniversity.com • RSTLM
2	Consult with OP in the recruiting of a powerful TL.	<ul style="list-style-type: none"> • RSTLM process • AVA • TL job description
3	Consult with OP/TL in the recruiting of a powerful MCA.	<ul style="list-style-type: none"> • RSTLM process • Behavioral assessments • MCA job description • MCA Skills Assessment Test
4	Consult with OP/TL on recruiting of powerful associates.	<ul style="list-style-type: none"> • KWU • MREA • MAPS
5	Drive implementation of KW systems.	<ul style="list-style-type: none"> • Regional Leadership • Manuals • Ongoing training
6	Consult with OP on PR.	<ul style="list-style-type: none"> • MC Value Proposition • Regional Value Proposition • KWRI Value Proposition
7	Go back to step one—again and again!	<ul style="list-style-type: none"> • Manuals

Key Points

The first 120 days in the life of a new Market Center is the most crucial time. It is during this period that the Market Center:

- Recruits the associates who become the foundation
- Develops their image and reputation
- Develops momentum
- Makes critical facility decisions
- Develops Team and Leadership attitudes
- Learns the Keller Williams system
- Learns the Keller Williams culture

Make sure you have at least one great Market Center in your Region. Once you have one or two strong franchises in your Region, they will serve as models as you add franchises.

This will be the busiest and most important time ever with the OP. If launched successfully, they will more than likely never need this much time again. How well they are coached and led will determine, in large part, how successful a new OP will be.

The Market Center Launch manual is the manual for launching a Market Center.

*Read and understand the
Launch and FSO manuals.*

Sample Welcome Letter

On behalf of the Launch team, it is my pleasure to **WELCOME** and **CONGRATULATE** you as the newest member of the KWRI family.

It is our team's mission to ensure that you receive the support and tools necessary to successfully conduct a productive and profitable world-class launch. During your first 120 days, it is our hope that you will come to think of us as a life-line between your market center and the many various departments/resources available to you here at KWRI.

A few of the products/services that we have generated to help better transition you through this launch phase include, but are not limited to:

Market Center Launch Manuals

- This bundle of select manuals has been assembled for you on one CD to act as virtual blueprints to the opening and running of a productive and profitable Keller Williams Realty franchise. The provided systems, processes and models have been perfected through years and years of trials, errors and success. Should you run across any questions upon review of the included manuals, please contact our team at launch@kw.com.

Market Center Technology Checklist and Launch Tech Setup Guide

- Please keep your eyes peeled for a Technology checklist and Launch Tech Setup Guide that will be arriving in your inbox within the next 48 hours. This checklist will outline the various tools you will be receiving as a part of your launch. The Launch Tech Setup guide will serve as your roadmap for setting the tools up.
- **This Checklist will also outline the setup and use of your market center's email address.**

**Please direct any technology-based questions to launch@kw.com.*

In addition to the above listed services/products provided by the Launch team, as one of our newest Market Centers, you will be receiving various welcome bundles/notes from other departments here at KWRI. These assorted goodies have been hand-selected to help you and your Market Center start down the path of profitability as quickly as possible. Attached you will find a document further outlining the various items that you will soon see either delivered to the address provided upon Market Center number receipt, or crossing your inbox.

Again, we are so thrilled to have you join the KW family! Please, please let us know if you have any questions and/or suggestions during this exciting time. The best way to contact our team is via the launch@kw.com email address; this inbox is checked on a regular basis and by multiple individuals to ensure as timely a response as possible.

Congratulations again - we look forward to working closely with you to help conduct a world-class Launch.

Yours in continued excellence,

Items New Market Center Receives (Sample)

ITEMS YOU WILL BE RECEIVING

(New Franchises)

Launch Team – Brett Decker & Trisha Lindahl

launch@kw.com

1. Launch Kit CD
 - a. Operations Models and Systems Manual
 - b. Launch Manual
 - c. MCA Training Manual
 - d. Company Identity Standards Manual
 - e. Policies and Guidelines Manual
 - f. WinMORE Manual
2. Technology Checklist
 - a. KW intranet username and password
 - b. MC email username and password
 - c. Instructions for loading financial software once available for download

Keller Williams University

kwuhelp@kw.com

1. Marketing and Recruiting Launch Bundle
 - a. MREA Masters: Rick Brenkus
 - b. MREA Masters: Chris Heller
 - c. Current Issues of Outfront Magazine
 - d. Buyer and Seller Scripts CD
 - e. Buyer Mastery & Seller Mastery Scripts CD

Keller Ink

support@kellerink.com

1. One case of *The Millionaire Real Estate Agent* (red) books
2. One case of *SHIFT*
3. One case of *Your First Home*
4. One case of *The Millionaire Real Estate Investor*
5. One case of *Green Your Home*
6. One case of *SHIFT Commercial*
7. One case of *Flip*

Mega Achievement Productivity Systems (MAPS)

maps@kw.com

1. MAPS coaching franchise fee contract
2. Client needs analysis worksheet

Events Team

familyreunion@kw.com

1. Family Reunion Information

kwu@kw.com

1. Educational subscription plan details
2. Upcoming calendar of events details

KW Cares

kwcares@kw.com

1. Information sheet on KW Cares
2. KW Cares Donation Program Setup Instructions
3. Fundraising Guidelines

KW Commercial

commercial@kw.com

1. Welcome Letter
2. Recruiting Brochure & Agent Member Application

KW Luxury Homes

luxuryhomes@kw.com

1. KW Luxury Homes Recruiting Brochure

Congratulations Script (Sample)

Hello [NAME], Operating Principal for the [MC NAME] MC ###!

Congratulations on your new Market Center! Please review the attached important information regarding KW Technology and the opening of your new Market Center

KW Intranet

The following is your username, password and the link to the Keller Williams Intranet:

Username: OPUusername

Password: OPpassword

Link: <http://www.kw.com>

You can log onto the Intranet to find your office website, marketing tools and market Center reports.

KW Email Address

Your market center email address is: klrw###@kw.com.

Username: klrw###@kw.com

Password: KWoogle###

Link: <http://email.kw.com>

You have been given administrative access to this email address. In order for your TL and MCA to be able to access this address you will need to set them up as delegates. To do this, please review pages 1 and 2 of the following document:

“Delegate Access”

If that link doesn't work, copy paste the following URL into a web browser:

<http://mykw.kw.com/kwintranet/image/Gmail-WorkingWithSharedTeamMailboxes.pdf?id=15096>

If you have further questions about setting up delegates, please contact launch@kw.com.

NOTE: Before you can provide your TL and MCA with delegate access, they must first have a personal @kw.com email address.

eEdge MyTransactions Setup

We are thrilled to bring you this forms, e-signature, transaction management, compliance and document storage all-in-one solution as another piece of eEdge!

In order to get your new Market Center activated with MyTransactions, we would greatly appreciate your help by appointing one designated person to coordinate the following:

1. Serve as the “Forms Point of Contact” by collecting the proper standard real estate transaction forms and contracts and uploading to DotLoop using the forms uploader located at <http://docspot.dotloop.com> as soon as possible.
 - State and Local Board forms will be programmed and loaded at no additional cost to the Market Center. Form creation in excess of required State and Board forms, will be loaded for a fixed fee of \$100 per form to be invoiced directly to the Market Center. Market Center non-transactional forms, like checklist, can be loaded individually by the Market Center in their Broker’s My Documents section as a PDF at no charge.
2. Coordinate a Market Center training schedule with your Region.
3. Communicate and promote the training event schedule to your Market Center.
4. Email launch@kw.com with the name and email address of the person at your Market Center who should have access to the eEdge broker’s dashboard. This person will be able to grant access to any other member of the market center who needs access.

Important Information

Technology

Our Online Help Desk <http://answers.kw.com> is a good resource for instructions on a wide array of topics. Please spend some time browsing this site. If you have specific questions regarding the items listed on the market center checklist excel spreadsheet, email Launch@kw.com.

Software – WinMORE and AccountEdge

Your software will be made available via FTP so please ensure you complete the above step and contact us when you receive your MCA computer and it is connected to the internet. You will receive an e-mail from The Launch team with more information about this software along with the serial number pertaining to your MC. There will also be instructions on how to download the programs to your computer. Your Launch technology coordinator, launch@kw.com will be able to assist in the load of WinMORE and AccountEdge with your MCA or Technical Personnel.

Providing MCA and Team Leader Access to KW Intranet

If your MCA does not have access to the KW Intranet or has not been assigned the leadership role in the KW Rosters, contact your region ASAP and ask them to e-mail roster@kw.com and inform them whom your Team Leader and MCA are. This must be done in order for them to gain access to the KW Intranet <http://www.kw.com>. If you would like to confirm that this has been done, contact your launch team at launch@kw.com for assistance.

Webexone.com/WebOffice Accounts

Leadership WebOffice Accounts

An Operating Principal and Team Leader Webexone.com/WebOffice membership has been set up for each Market Center Leadership role. An e-mail invitation has been sent to your e-mail account with a temporary username/password allowing you access to the leadership WebOffice that pertains to your role. The following are links for each leadership role:

Operating Principal WebOffice: <http://kwop.webexone.com>

Team Leader WebOffice: <http://kwtl.webexone.com>

Once you log in, please change your username and password to something you can remember or that is consistent with your other passwords such as your KW Intranet login.

I look forward to hearing from you soon.

Best regards,

Trisha Lindahl

Keller Williams Realty International

512-306-6728

Launch@kw.com

Notes

Action Focus Train OPs

Ensure the OP immediately schedules and attends all required training. Personally attend key events with your OP. Plan weekly training and consulting with the OP.

Regional Orientation—Should include the following topics:

- Review Market Research Analysis (Launch Manual)
- Review calculations from Market Research:
 - CAP to market center—Sweet Spot!
 - Commission Schedule
 - Agent Mix Analysis Business Plan (using KW Forecast Model)
- Start up/Conversion Cost Analysis
- Furniture/Fixtures Cost Analysis
- License Agreement completed and signed by OP
- Review Training Manuals
- Set up training schedule for OP, TL, and Core Group
- Ensure computer specs before purchasing computer equipment. Visit answers.kw.com and enter **MCA Technology Requirements** in the search box.
- Franchise Systems Orientation
- Check the KWU schedule online at <http://kellerwilliamsuniversity.com>
- Regional Post FSO Debrief—Include the following topics:
 - KW History/Profit Sharing
 - Culture
 - Tools available:
 - KWU Products (<http://kellerwilliamsuniversity.com>)
 - Marketing Products
 - Vendor information
- Review Recruiting Packet
- Review Recruiting Presentation
- ALC
 - Policies and Guidelines Manual
 - ALC Training Outline

Checklists for KWU Courses for OPs, TLs, and MCAs

Learn to earn with KWU. Jump back into courses regularly, and utilize their systems and tools habitually. Couple your learning with accountability in KW MAPS Coaching programs to ensure success.

Operating Principal Curriculum

Required Courses	Scheduled on	Done
Market Center Launch*		<input type="checkbox"/>
FSO* (Franchise Systems Orientation)		<input type="checkbox"/>
RSTLM: Recruit-Select		<input type="checkbox"/>
RSTLM: Action Training		<input type="checkbox"/>
RSTLM: Leadership and Motivation		<input type="checkbox"/>
OP Boot Camp*		<input type="checkbox"/>
Recruiting Great Agents (TL Boot Camp)		<input type="checkbox"/>
Keeping Agents First* (Retention)		<input type="checkbox"/>
Market Center Financials		<input type="checkbox"/>
ALC Clinic for Leadership		<input type="checkbox"/>
ALC Leadership for ALCs		<input type="checkbox"/>

*Covered by prepaid funds subscription

Note: Always check current requirements on the KWU website for courses and certifications.

Team Leader Curriculum

Required Courses	Scheduled on	Done
Market Center Launch*		<input type="checkbox"/>
FSO* (Franchise Systems Orientation)		<input type="checkbox"/>
RSTLM: Recruit-Select		<input type="checkbox"/>
RSTLM: Action Training		<input type="checkbox"/>
RSTLM: Leadership and Motivation		<input type="checkbox"/>
Recruiting Great Agents* (TL Boot Camp)		<input type="checkbox"/>
Keeping Agents First* (Retention)		<input type="checkbox"/>
Market Center Financials		<input type="checkbox"/>
ALC Clinic for Leadership		<input type="checkbox"/>
ALC Leadership for ALCs		<input type="checkbox"/>
Train the Presenter		<input type="checkbox"/>

*Covered by prepaid funds subscription

MCA Leadership Curriculum

Required Courses	Scheduled on	Done
MCA Skills* (Online)		<input type="checkbox"/>
MCA Success in the Office*		<input type="checkbox"/>
FSO* (Franchise Systems Orientation)		<input type="checkbox"/>
Market Center Launch		<input type="checkbox"/>
Market Center Financials		<input type="checkbox"/>
ALC Clinic for Leadership		<input type="checkbox"/>
ALC Clinic for ALCs		<input type="checkbox"/>
MCA DRIVE		<input type="checkbox"/>
RSTLM: Leadership and Motivation		<input type="checkbox"/>
RSTLM: Recruit-Select		<input type="checkbox"/>
RSTLM: Action Training		<input type="checkbox"/>

*Covered by prepaid funds subscription

AVA of an A+ Team Leader

Keep in mind that an individual's AVA "match" with a JAR does not indicate how good they are at that job! A good behavioral match between an AVA and a JAR simply means that the person will not have to adjust their natural style very much in order to succeed at that job. Besides behavior, two other major factors in job success are an individual's skills and the quality of training/management available.

Keep in mind that the more behavioral "shifts" a person has to make to meet the job's demands, the more difficult it will be for them to succeed. If a person is poorly matched with their job, no matter how good the training or the skills they have, over time the job's demands will become more and more stressful for them and can lead to poor performance, low morale, and burnout.

The major keys to success in the Team Leader role are being naturally dynamic when interacting with people and having a high level of mental energy to do so. The Team Leader JAR is an 8912, and three of the most successful TLs have AVA graphs of 7931, 9632, and 7814.

- The first person does not have to make many adjustments to succeed in her role; she may find there are times when she might perform better if she were slightly more assertive or faster-paced.
- The second person may substitute a higher level of drive in place of being more naturally persuasive and at ease being around people constantly — because she is driven to succeed in her job, she will figure out what she needs to work on to succeed and do it! It may be somewhat stressful for her to be "on" all the time in her job, but her assertive style will push her to succeed. She also has the high level of mental energy that this job demands.
- The third person also does not have to make many adjustments to succeed.

Consult TL on Locating a Powerful MCA

Make Sure That the Following Happens ...

1. MCA Assessment, DISC, Résumé, and AVA profile are sent to Region.
2. RSTLM process is followed.
3. Region has approved the MCA.
4. MCA attends MCA Skills (online class).
5. MCA transmits on time.

Profile of an A+ MCA

1. Strong Accounting background, ideally accountant or bookkeeper.
2. Passed the MCA Assessment Test with a minimum score of 80 percent (located on mykw.kw.com under Resources).
3. Basic understanding of computer functions and software to include:
 - MS Office
 - Email Software
 - Internet Navigation
 - Windows Explorer
 - Accounting Software
4. Detail oriented.
5. Able to balance detailed tasks with service leadership mentality of assisting associates.
6. Clear background check.

Important MCA Assessment Considerations

The MCA Assessment is located at mykw.kw.com under Resources, MCA Assessment.

The MCA Assessment must be completed on site and within an hour.

MCA Assessment


MCA Assessment

Giving the MCA Assessment

As part of the hiring process, an MCA candidate should complete an MCA Assessment. This assessment will help you determine the candidate's accounting knowledge. Contact kwmcangel@kw.com with any questions.

Accessing the Assessment

To access the assessment, log into <http://mykw.kw.com> and click Resources. Select MCA Assessment.



Taking the Assessment

Once you have launched the assessment, the candidate will answer a series of questions, starting with their name and location of the Market Center. They will use the next button at the bottom of the screen to move forward to the next question.

***Special Note:**
You can not move back to a previously answered question.

Submitting the Assessment

The assessment is automatically submitted for scoring upon completing the final question.

Assessment Results

A pass/fail notice will be shown upon completion and an email will be sent to the Regional Office within the next 24 hours.

While a score of 80% or higher is considered passing, you will only receive a notice of pass/fail. You will not receive the actual score.

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MCA Assessment

Taking the MCA Assessment

The MCA Assessment is used to determine a person's accounting knowledge. Please let a Market Center staff member know if you have any questions.

Accessing the Assessment

The Market Center staff member will log into mykw.kw.com. Under Resources, select MCA Assessment.



Taking the Assessment

Once the Market Center staff member has launched the assessment, you will answer a series of questions, starting with your name and location of the Market Center. You will use the next button at the bottom of the screen to move forward to the next question.

***Special Note:**
You can not move back to a previously answered question.

Submitting the Assessment

The assessment is automatically submitted for scoring upon completing the final question.

Assessment Results

A pass/fail notice will be shown upon completion and an email will be sent to the Regional Office within the next 24 hours.

A score of 80% or higher is considered passing.

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AVA Profile of an A+ MCA

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Keep in mind that the more behavioral “shifts” a person has to make to meet the job's demands, the more difficult it will be for them to succeed. If a person is poorly matched with their job, no matter how good the training or the skills they have, over time the job's demands will become more and more stressful for them and can lead to poor performance, low morale, and burnout.

The MCA role is perhaps the most demanding in terms of finding the right behavioral style that can function effectively wearing so many hats. Someone who is a perfect match with a JAR of 3494 is patient and systematic and will do quality work. However, the job is structured in such a way that virtually no one will have all aspects of that position come very naturally to them—for instance, someone who is sociable enough to be effective in this position may have to work harder at getting every last detail precisely correct in the accounting part of the job, or vice versa.

This is certainly true for some of the most successful MCAs—although one is a very close match at 2594, other high performers include an 8381 and a 3881.

- The 8381 finds the social demands of the job a bit more stressful and prefers to be somewhat more independent than the MCA role demands.
- In contrast, the 3881 has an extremely people-oriented and helpful approach and probably finds that aspect of the job more enjoyable than the number-crunching.

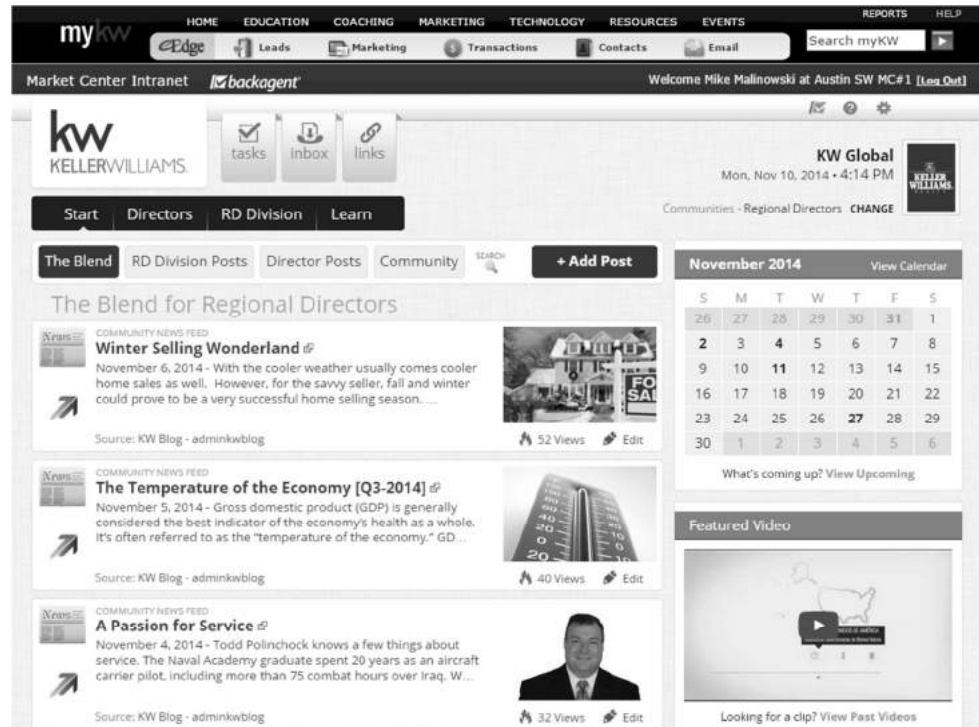
Chapter 3:

Support Your

Market Centers

1. Support Through Meeting Standards of Compliance
2. Support Through Consultation
3. Support Through Training and Coaching Systems

Regional Intranet



On the Regional Intranet you will find:

- All Current Application(s)
- Materials from Webinars/Meetings
- How to Order an AVA
- Current Regional Leadership Roster
- and Much More!

How to access the Regional Intranet

Go to mykw.kw.com, sign in, and click on **Region** in the Quick Links area at the bottom right of the page.

The Steps to Leading the Region

The Steps		Tools/Resources
1	Lead the Region using the KW systems.	KW Manuals Self-Assessment
2	Lead the performance using the numbers.	MC Weekly Flash Reports Growth Initiative Tools
3	Track and consult with owners.	Financials Growth Initiative Tools
4	Implement annual Regional KWU event calendar and conduct world-class training and inspirational events.	KWU Staff KWU Master Trainers http://kellerwilliamsuniversity.com
5	Build an ongoing, growing, and valid pipeline of qualified, talent.	Contact Management Software 33 Touch Program Broker Metrics Lead Generation Plan Growth Recruit-Select
6	Spin off new franchises (with owner's support and approval) from the successful franchises that you have developed	Accountability sessions with successful OPs Leadership and Relationship Ongoing

Commitment Standards and Processes

The Keller Williams models and systems are infused throughout the Market Center License Agreement and incorporated manuals. Market Center franchisees commit to follow the License Agreement, and through monitoring and enforcement of these commitments, KWRI and the Regions fulfill their responsibility to support Market Center operations at the highest level. The following is a general overview regarding our standards and processes. Any request made that does not meet our standards must be submitted with a clear rationale and recommendation from the Region, including an explanation of why you recommend the nonstandard request.

Section 1 - Monthly Regional Open Items Summaries

Each month, you will receive a summary of the current status of any open items currently in process in your Region. We will ask for regular feedback on some of the items in process. It is important that your Region provide adequate feedback when requested, in order to keep us up to date on the most current status of each item in process.

Section 2 - Types of Defaults and KWRI Notification/Letter Process

Please note that unless the default is cured, KWRI requires that a notice be sent to comply with our standards. RDs will be provided the notice 48 hours prior to the notice being sent to the Market Center. The RD is expected to call the OP prior to receiving the letter in order to ensure that the Region can address any questions the OP may have.

The most common default notices sent by the Commitment Group are outlined below:

OP Vacancy Notices

- The Franchise Agreement requires the Market Center to designate a qualified replacement Operating Principal within 60 days of that position being vacated.
- The Market Center is provided 30 days to cure this default for first- and second- time notices. Third-time default notices will be specific to the current Market Center status.

TL Vacancy Notices

- The Franchise Agreement requires the Market Center to designate a qualified replacement Team Leader within 60 days of that position being vacated.
- The Market Center is provided 30 days to cure this default for first- and second- time notices. Third-time default notices will be specific to the current Market Center status.
- OP participation in Recruit-Select may be required.

MCA Vacancy Notices

- The Franchise Agreement requires the Market Center to designate a qualified replacement Market Center Administrator within 30 days of that position being vacated.
- The Market Center is provided 30 days to cure this default for first- and second- time notices. Third-time default notices will be specific to the current Market Center status.
- OP and/or TL participation in Recruit-Select may be required.

GCI Notices

- The Market Center is required to maintain a minimum GCI average for any three consecutive-month period; depending on the License Agreement version and the development stage of the Market Center, this requirement could be \$20,000, \$45,000, \$75,000, or \$125,000.
- The Market Center is provided 90 days to cure this default for first- and second- time notices. Third-time default notices will be specific to the current Market Center status.

Unauthorized Office Notices

- Sent when KWRI is notified of an unauthorized location/office. This default references a 24-hour time-frame to cease conducting business from the unauthorized location and to remove any signage or other advertising.

Unauthorized Ownership Change

- Sent when KWRI is notified of unauthorized ownership changes that have not properly been approved and documented via the transfer application process.

Owner Affiliated with Competitor Notice

- Sent when any investor in the Market Center engages in business in another real estate brokerage while maintaining ownership in a Keller Williams Market Center.

Section 3 - Roster Rules/Recommendations

The Region is responsible for all updates, which should be sent to roster@kw.com. The names should be as consistent as possible with how they appear in the White Pages and email requests should reference the Market Center Roster name and number. If not submitted by the RD, the RD should be copied on the Roster request. KWRI relies on the Region for current information.

KWRI has elected to allow an interim designation for individuals in certain situations in order that the vacant leadership role can be fulfilled temporarily, at least in part, as the Market Center diligently works with the Region to submit a new OP, TL, or MCA for approval within the applicable cure period. By designating an “interim” role, the Market Center’s obligation to fill this role with an approved leadership candidate is not extended. This is simply a way for the Market Center to continue operating at a diminished capacity with someone temporarily fulfilling the applicable leadership functions under our model, while the Recruit-Select process and any required documentation is completed. Please note that the default clock will not be reset when individuals are added or removed from the interim status.

OP Roster Adjustments

- All OP changes require a Change of OP Transfer Application. To remove an OP from the roster, a request should be sent requesting removal and should be accompanied with a resignation letter from the current OP.
- To add an Interim OP, the Region should submit the Licensee’s formal request for the appointment of this individual, at which time, if approved by KWRI, an Interim OP Approval Notice along with training guidelines will be sent to the OP and MC providing 60 days to submit an approvable Change of OP Transfer Application.
- With the Region’s recommendation, KWRI may remove an OP’s approved status for failure to meet an OP’s obligations.

Team Leader and MCA Adjustments

- The roles are added/removed from the White Pages by Regional request. Confirmation emails will be sent to the Market Center and OP along with training requirements for all roles.
- The MCA must have passed the MCA Skills Assessment Test in order to be approved in this role.

Assistant TL and Assistant MCA Roles

- Assistant TL and Assistant MCA roles are added/removed by Regional request. Please note that Assistant TLs and Assistant MCAs will not be provided access to the TL and MCA intranets unless specifically requested.

Market Center Change of Address

- KWRI reviews the proposed new location of the office in conjunction with the Market Center's Awarded Area. The proposed location should be as centrally located within the MC territory as possible. If the proposed location is on or near a border of the Awarded Area, a Boundary Amendment and Market Research Packet may be required (see Section 6).

Business Center Change of Address

- KWRI reviews the proposed new location of the office in conjunction with the Market Center's Awarded Area. The proposed location should be located inside the MC territory and, if outside, the Region should provide a recommendation for the nonstandard location. Business Center address changes will be final once a new Business Center Addendum is prepared by KWRI and signed by the Market Center (see section 8).

General Manager Adjustments

- General Manager requests should be accompanied by the Region's approval and validated Recruit-Select for the proposed GM. The Operating Principal and GM should be the same for all offices requested for multiple GM roles.
- To be approved, a General Manager candidate must meet the criteria for a Multiple Market Center Operating Principal, and like other leadership roles within the same Market Center, no GM who has a familial relationship or other connection that would inhibit full accountability will be approved by KWRI.

Regional Leadership Roster Changes

- Regional leadership roster change requests should be sent by the Regional OP or Regional Director.

Section 4 - Types of Applications/Application Standards

All applications (except the Renewal and Ownership Change Applications) can be found on the Regional Intranet. Current versions must always be used, and, may be updated from time to time. All KWRI applications have been developed to provide you with clear, specific instructions and are formatted to provide you direction on the information we need to consider the Market Center's proposal.

Applications

Transfer Applications

- There are two versions; only one should be submitted for each transfer.

Change of OP Transfer Application

- This application must be submitted if a change of OP is occurring. It requests additional, required information, which a basic Ownership Change Transfer Application does not include.
- This application must be filled out completely, unless the Market Center is changing OPs ONLY and NO ownership changes have occurred. If no ownership changes have occurred, only Section 3 must be submitted, along with a letter signed by the incoming and outgoing OPs and the Regional Director.

Change of Ownership Transfer Application

- A Change of Ownership Transfer Application should be submitted for any and all changes in the ownership structure of a Market Center, except ones that involve the OP. For any proposed ownership change, the information should be submitted to KWRI for consideration of its right of first refusal. If KWRI does not elect to exercise its right, a transfer application specific to the proposed change(s) will be forwarded to the Market Center for completion. No ownership change is final until a completed application is submitted to and approved by KWRI and all required documentation is fully-executed.

Mega Associate Office Application

- Submitted for any proposed Mega Associate office location. This application can be found on the Regional Intranet.

Business Center Application

- Submitted for any proposed Business Center location. This application can be found on the Regional Intranet.

Renewal Application

- This application will be sent to the Market Center directly from KWRI, once approved. It is not posted on the Regional Intranet.

Section 5 - Renewal Process

The objective of the renewal process is to complete an assessment of the Market Center to determine whether it meets renewal standards and completes the renewal, or an approved transition if the Market Center does not meet the standards, by the renewal date. The following is a list of standards for the Regions to consider when reviewing each Market Center renewal.

- Consistent profitability, or a sustained, positive trend in profitability
- Consistent profit sharing (in at least four out of every five months over the past two years, per the License Agreement)
- Associate count meets the standards of the model, or sustained positive trend and a track record of consistent participation in growth initiatives
- All leadership current in required training, participating in events and engaged in their roles in accordance with the model
- Investment group accurately reflected in the License Agreement
- Investment group engaged in required training and growth activities
- Three months of cash reserves
- No outstanding financial statement issues or exceptions
- History of timely submission of annual budget
- No current default
- No history or pattern of continuous defaults

Please note: These are general standards, not a checklist or formula. The Region must maintain consistency in its standards for all Market Centers in the Region and must be consistent with KWRI's standards for renewal. KWRI retains the right to consider other, relevant criteria in establishing whether a Market Center should be renewed pursuant to the terms of the License Agreement.

Renewal Process and Timeline

13th month prior to Renewal Date

- KWRI Commitment Team provides the Market Center's current default and default history information to Region.

12th month prior to the Renewal Date

- Region completes assessment of the Market Center in relation to the renewal standards and holds a meeting with the OP to discuss the assessment.
- Region and OP agree on goals that must be met for the Region to recommend renewal, and a plan of action to get there within six months.
- For challenged Market Centers, an agreement should be signed by the OP and RD establishing that if mutually agreed upon goals are not met within six months, the OP will follow through with an approved transition plan to be completed by the renewal date.
- Region forwards assessment and action plan to KWRI for filing and tracking purposes, along with any transition commitment from the OP (if applicable).

9th month prior to the Renewal Date

- Assessment of progress/status by the Region (or earlier, if appropriate).

6th month prior to Renewal Date

- Region sends to KWRI an updated assessment/status report and recommendation for renewal or transition.
- KWRI reviews the recommendation and supporting information, determines next steps and sends written notice to the Market Center.
 - If renewal is recommended by the Region and validated by the assessment, KWRI will send a renewal application to the Market Center for completion and submission.
 - If a transition plan is recommended by the Region and validated by the assessment, KWRI will send a written notice to the Market Center regarding the transition plan requirements.

Renewal Date

Renewal or approved transition to be completed by Renewal Date.

An extension of the License Agreement will only be given for a limited period of time, on an as-needed basis, in order to allow for finalization of the renewal or approved transition.

Section 6 - Transfer Process

Market Centers are required to submit transfer applications for all ownership changes. The most recent documented and approved ownership of a Market Center can always be found in the current License Agreement or in a subsequent Transfer Addendum. Please see Section 4 for details on transfer applications.

Section 7 - Awarded Area/Territory Amendment/ Mapping and Software

The approved Awarded Area for a Market Center can be found in the current License Agreement or subsequent Boundary Amendment. If a territory adjustment is requested for the Market Center, a complete Market Research package, new written territory description, and map of the territories signed by the RD and OP should be submitted to KWRI for review. All Awarded Area descriptions must be enclosed territory using clear and lasting descriptions (roads, rivers, county lines, etc). They should begin using an intersection or starting point and be detailed, continuous, and should end back at the starting point.

Mapping and Software

- We recommend that each Region purchase computer mapping software to perform mapping functions without complete reliance on KWRI. This will speed up the review process, particularly when you are submitting a new Market Center application or are requesting a territory adjustment for an existing Market Center.
- Streets and Trips and MapPoint software are both currently in use by KWRI, although these programs are no longer supported by Microsoft, and KWRI is researching to find replacement programs.

Section 8 - Disclosure Process

- All FDD disclosure requests are to be sent to FDD@kw.com and must include the name of the investor or potential investor, state of residence, email address, Market Center name and number, and purpose for disclosure. Disclosures will only be sent pursuant to a request by the Region. The Market Center name and number, and state of residence of the disclosed, will help determine which FDD an individual may need to receive.
- All individuals must be disclosed prior to any new application.

- All individuals attending FSO should be disclosed prior to coming to Austin for the event.

Item 23 (USA) and Disclosure Receipt (Canada)

- The Item 23/Disclosure Receipt simply confirms the individual received the FDD. The potential investor is required to sign and date the Item 23/Disclosure Receipt and return a copy to KWRI. Item 23s/Disclosure Receipts are specific to each Region. An individual may be disclosed numerous times within the FDD year, depending on their ownership in Market Centers in multiple Regions. Some investors, depending on their ownership and number of times their respective Market Center submits some sort of application, may be required to submit Item 23s/Disclosure Receipts yearly. The Region's specific Item 23/Disclosure Receipt will be required for each application. An Item 23/Disclosure Receipt is invalid if it is unsigned, undated, the wrong version or year, or an unauthorized individual is listed as the franchise seller. The Region will receive notification of each Item 23/Disclosure Receipt that KWRI receives.

Applications and Disclosures / Item 23/Disclosure Receipt

It is highly recommended that you disclose the entire investor group as soon as possible, as it sometimes takes an extended period of time for investors to return their respective Item 23/Disclosure Receipts. ALL investors, including husbands and wives, who are listed in the ownership group, must be disclosed and return an Item 23/Disclosure Receipt before an application can be approved. You can save much time by disclosing early! Redisclosure of the FDD can be sent for any investors who have failed to return the Item 23/Disclosure Receipt upon request.

Annual FDD Updates

The FDD is updated annually by the end of April (USA) or June (Canada) to comply with federal and state/provincial franchise regulations. There is a normal lag period in which disclosures cannot be sent until approved by certain states, i.e., "registration states." In some cases (notably California, Illinois, Maryland, New York, Virginia, and Washington), this lag time is almost always months. If there are new Market Center applications, transfers, renewals, etc., in process or yet to be submitted after KWRI's annual FDD expiration notice to the Regions, all owners in the applicable Market Centers must be redisclosed with the new version of the FDD, even if they have already been disclosed in the prior year's FDD. New Item 23/Disclosure Receipts will also be required.

Section 9 - License Agreements/TA&Cs and Types of Addenda

License Agreements

- The OP is sent a paper copy of their fully executed License Agreement. The Region is sent an electronic copy of each License Agreement. A new License Agreement is required for all renewals and most transfers. KWRI, in its discretion, may document a transfer with a Transfer Addendum to the current License Agreement in lieu of requiring that a new License Agreement be executed.

Transfer Agreement and Consent Forms

- This accompanies any License Agreement in which a change in ownership occurred. Requested signatures are dependent on the changes which occurred from the previous License Agreement to the new License Agreement.

Indemnification Agreements

- Sent to the OP from time to time, as appropriate. This document protects both the Region and KWRI when certain investor signatures are not able to be obtained.

Business Center Addendum

- Sent electronically to the OP once the application has been approved for execution and return.

Mega Associate Office Addendum

- Sent electronically to the OP once the application has been approved for execution and return.

Boundary Amendment

- Sent electronically upon approval of a change in the Awarded Area (see section 7) for execution and return.

Commercial Addendum

- Sent electronically to the OP upon Regional request for execution and return.

KWU Addendum

- Currently accompanies all new Market Center License Agreements.

Temporary New Home Sales Location Addendum

Sent electronically to the OP by Regional request and a copy of the Listing Agreement. Please note that there is not an application for this type of addendum.

Section 10 - Transparency

KWRI must have clear records regarding all owners and investors so we can communicate effectively, help protect the Market Center by making all necessary regulatory disclosures, and safeguard our brand and reputation. KWRI granted each Market Center franchise based upon the business skill, financial capacity, and character of the Operating Principal and each of its Principals. Should the ownership of the Market Center change, we must know about it in advance and must approve the transfer.

We ask that each Market Center and Region complete a Transparency File Data Sheet at least annually and return it to KWRI within thirty days. If there are any discrepancies between the current ownership structure, required roles, etc., and that which we have formally approved and documented, the Market Center must complete and submit the applicable transfer application and/or Roster request for our review and proper documentation.

We also ask that the Region review each Transparency File Data Sheet submitted from Market Centers, compare the new information with what has been approved and documented, and have the RD sign and date the file data sheet before submission to KWRI.

Section 11 – Market Center Success Plan

Market Center Success Plans may be used when a Market Center proposes to fill a leadership position with a candidate that does not have a clear track record of success or when a Market Center does not clearly meet renewal standards. The standard Success Plan lasts six months, allowing the candidate one month to ramp up, then meet established growth, profit, and leadership commitments over the remaining five months. The standard Success Plan structure for marginal leadership candidates or Market Centers that do not meet renewal standards is as follows:

- Growth: The Market Center will net 15 new agents within the next six months;

- Profit: The Market Center will increase Owner Profit by 15 percent for MONTH 2 through MONTH 6, as compared to the same timeframe in the prior year, and Profit Share at appropriate levels;

- Leadership: The Market Center leadership team will participate in all applicable Regional and International calls and events, and the OP and TL will participate in the respective OP Mastery Coaching and Team Leader Mastery Coaching through KW MAPS Coaching.

- Compliance: The Market Center must resolve the following defaults/compliance issues:

Critical to this process is that the Market Center clearly understand and commit to these standards. Once the Market Center commits to this process, KWRI will document these commitments in writing. For a marginal leadership candidate, if the Market Center does not meet the growth, profit, and leadership commitments, the Market Center must find and submit a new candidate to lead the Market Center moving forward. For a Market Center that does not meet renewal standards and fails to meet these commitments, it must find a new approved Operating Principal to lead the Market Center, or effect some other transition, such as an approved conversion to a Business Center, merger with another Market Center, or closure.

Notes

Get Trained

Truth

**It takes being a great student
in order to ultimately become a great teacher.**

In order to lead the Region to be learning-based, Regional leadership must walk the talk by attending continuous training.

Your Training Calendar

NOTE: Always check with knuu@kw.com for the most current requirements.

Course Name	Date Completed
Market Center Launch	
Franchise Systems Orientation	
Recruiting Great Agents (Team Leader Boot Camp)	
Keeping Agents First (Retention)	
RSTLM	
Train the Presenter	
Six Personal Perspectives	
ALC Clinic	
Market Center Financials	
Time Management with the 4-1-1	
Leadership Unlocked	
Ignite	
Business Planning Clinic	
Win with Buyers	
Win with Sellers	
Lead Generation 36:12:3	
Mega Recruit-Select	

Host World-Class Events

There are four keys to hosting world-class training and inspirational events in your Region:

1. Focus on the standards and resources of Keller Williams University, KW MAPS Coaching, and KWConnect.
2. Create a world-class Regional training calendar.
3. Recognize Regional accomplishments with awards.
4. Hold an annual inspirational event.

Information and guidelines on each of these appears on the following pages.

KWU Events

KWU provides a series of training events in Austin each year.

NOTE: The most current dates can always be found on the KWU website:

<http://apps.kw.com/events/austinevents>.

Events Austin Events Regional Events Family Reunion Mega Camp Masterminds RED Day All KW Calendar

LEARNING CENTER TRAINING SCHEDULE

Austin Events

Welcome to the Events page for Keller Williams University events being held in Austin, Texas!

- To view Course details, click on the Course Title.
- To register, click the **REGISTER** button of the specific session.
- To view specific session details, click on the **View Details** link.

IMPORTANT: If you do not see a future event listed on this page, registration is not yet open for this event. Please contact kwu@kw.com for more information.

Registration fees now includes materials, instruction, wireless access, and a daily lunch!

Course Title	Date	Instructor	Audience	Price	Details	Register Now
Expansion Systems Orientation (ESO)	10/16/2014, Thu - 10/17/2014, Fri	Kristan Cole	All	\$199.00	View Details	REGISTER
Franchise Systems Orientation (FSO)	10/20/2014, Mon - 10/21/2014, Tue	Dick Dillingham	All	\$399.00	View Details	REGISTER
MCA Success in the Office	10/23/2014, Thu - 10/24/2014, Fri	Jennifer Roach	MCA	\$199.00	View Details	REGISTER
Operating Principal Boot Camp	10/23/2014, Thu - 10/24/2014, Fri	Gene Rivers	OP	\$249.00	View Details	REGISTER
Launch	11/17/2014, Mon	Kathy Neu	All	\$125.00	View Details	REGISTER
Franchise Systems Orientation (FSO)	11/18/2014, Tue - 11/20/2014, Thu	Sherry Lewis & Kathy Neu	All	\$399.00	View Details	REGISTER
Fierce Conversations	11/19/2014, Wed - 11/20/2014, Thu	Antoinette Perez	All	\$549.00	View Details	REGISTER
Expansion Systems Orientation (ESO)	12/04/2014, Thu - 12/05/2014, Fri	Kristan Cole	All	\$199.00	View Details	REGISTER

KW MAPS

Knowing that each person is an individual with unique strengths and challenges provides MAPS (Mega Achievement Productivity Systems) the opportunity to offer programs tailored to the individual based on KW MAPS Four Cornerstones of Coaching:

1. We believe the Client is creative, resourceful, and whole.
2. We believe the coach must address the person as a whole (Their entire life, yet keep them in production).
3. We believe the issues are from the Client and their business.
4. We believe the relationship is one of partnership.

The MAPS programs include:

1. Coaching

- a. Mastery (one-on-one)
- b. Breakthrough (one-on-one)
- c. Performance
- d. Fast Track Group Coaching
- e. BOLD
- f. BOLD for Business
- g. Productivity Coach's Coaching
- h. MCA Coaching
- i. Mega Agent Expansion

2. Events

- a. Masterminds
- b. Mega Camp
- c. Recharge
- d. Coaching Skills Camp
- e. Advanced Coaching Skills Camp
- f. Power Prospecting Workshop
- g. Recruiting for Rockstars Workshop
- h. Expansion Systems Orientation

3. Other Programs

- a. Young Professionals

4. Systems and Tools

- a. Power Ups
- b. MAPS Apps
- c. MAPS Achiever
- d. Products

KW MAPS Coaching Programs

Coaching takes you from where you are to where you choose to be. KW MAPS is the only coaching company that knows the models and systems of Keller Williams and the ONLY coaching company that has received the prestigious Prism and Stevie Awards.

KW MAPS Coaching provides: a variety of coaching programs ranging from group coaching to one-on-one coaching and gets results. Agents with KW MAPS coaching:

- Sell 4.3 times more volume
- Sell 5.3 times more units
- Earn 4.8 times more GCI than agents without coaching
- MCs are 31% more profitable when its leadership is in coaching

A commitment to coaching to become one's best is an integral part of Keller Williams Realty. KW MAPS Coaching is the best way to develop all associates and leadership.

- Mastery Coaching (ongoing weekly)
- Breakthrough Coaching (ongoing semi-monthly)
- Group Coaching (2-6 months)
- BOLD (7 weeks)

Mastery Coaching

Mastery coaches provide one-on-one personal coaching that zeros in on the participant's business plan, skills and mindset, holding them to their commitment to growing their business and income as swiftly as possible, no matter the market.

Mastery Coaching is only for people who want to advance quickly and are fully committed to doing so.

- For Agents, OPs, TLs, MCAs and Productivity Coaches
- \$1,000/month – Events included
- Weekly one-on-one intense coaching calls (minimum 40/yr.)
- Group call during events

The weekly Mastery Coaching session includes:

- Once the contract is signed, a MAPS needs analysis will be completed. After the analysis is reviewed, the client will be paired with the best coach to suit his or her needs.
- A full assessment of where the client is with productivity and profitability.
- A personalized action plan of what the client needs to do each week.

- Skill-based lessons that will help the client focus on his/her strengths in order to capitalize on them.
- Training with new scripts and dialogues that move client past barriers.
- Accountability sessions that will ensure that once client and coach have developed a plan, client implements it to ensure increased profitability.
- A minimum of 40 high-impact phone sessions from personal coach.
- Strategies designed to help make more money in less time so client can devote more time to his/her personal life and goals.
- Strategies for monitoring profits so that client keeps more of the hard-earned dollars made.
- The client has the right to request a transfer of coach at any time.
- FREE Call Friday 3rd Friday of Month – Dianna Kokoszka on leadership and team building (2:30 pm CST)

Mastery has privileges! These events are included in Mastery Coaching Membership:

Mastery includes complimentary registration to all Keller Williams and MAPS signature events including Family Reunion, Mega Camp, Masterminds¹, Mastery exclusive events, Mastery receptions and Franchise Systems Orientation².

An investment in Mastery Coaching provides the following value:

- | | |
|---|-------|
| 1. Family Reunion | \$599 |
| 2. Mastery Client Event at Family Reunion | \$250 |
| 3. Spring Masterminds (typically April or May) | \$550 |
| 4. Mega Agent Camp or
Mega Leadership Camp (choose one) | \$249 |
| 5. Agent or Leadership
Masterminds at Mega Camp (choose one) | \$400 |
| 6. \$250 Discount on Recharge | \$250 |
| 7. Franchise Systems Orientation
(One per year. There is a charge of \$40 per day to cover class materials, transportation and lunch.) | \$299 |
| 8. Mastery Receptions (3) | \$300 |

Total Included Value – \$2,897

This investment in agent is an annual contract at \$1,000 per month.

¹ Determined by KW role

² Registration only

Breakthrough Coaching

Breakthrough Coaching offers one-on-one coaching two times per month that boosts client's bottom line by teaching them skills-based models, scripts and dialogues focused on their strengths. Breakthrough Coaching teaches agents tactics to make more money in less time moving them beyond barriers and in the direction of Mastery Coaching.

This investment in agent is an annual contract at \$450 per month. No Events Included.

- For agents, OPs, TLs, MCAs and Productivity Coaches
- \$450/month
- Two 30-minute calls per month

(If agent chooses to move up quickly, *Mastery* is best option)

Performance Coaching

Performance Coaching is a “game changer” because it focuses on eliminating interference, or what is getting in the way of achieving greater results and higher performance.

Research shows that as much as 99 percent of what a person does every day is automatic, so how can that person raise their results by improving what is “automatic?” This type of coaching is based on the premise that performance by an individual, team or Market Center is determined ultimately by the potential available in that individual, team or Market Center.

Performance Coaching allows individuals to attain higher levels of performance by developing different habits or changing habits and therefore higher results. It is conducted on a one-on-one basis and is available and recommended to everyone. Whether a person is an agent, Team Leader, OP, RD or any other role—if they feel like something is holding him/her back, Performance Coaching is the solution!

Performance Coaching is available as a Mastery or Breakthrough contract.

Fast Track Group Coaching

KW MAPS Coaching offers group courses that amplify earnings by transforming outlooks through module-based learning.

Group Coaching provides access to concentrated courses that precisely target areas within business that slow progress. All coaches are highly-qualified top agents who have “been there, done that.” Facilitated by proven experts in each field, group courses consist of weekly sessions teaching the methods, scripts, language patterns and mindsets that empower Millionaire Real Estate Agents and leaders across North America.

Weekly, one-hour calls focused on specific topics:

- **90 Listings in 90 Days** – Dream of being a mega agent? It all starts with working smart. Learn from coach, **Craig Reger**, how to effectively manage your time and increase your production in this 90-day challenge. You'll immediately and effectively transform your business with a large inventory of listings to put you on the road to join KW's mega agents!
- **Baby Boomer Listings** – Baby boomers are the largest segment of the population and they are downsizing. How many have you assisted in selling their large home and helping them purchase a smaller home? This market is huge and you deserve a part of it. Learn from coach, **Aaron Simons**, how to effectively communicate and service baby boomers' needs and watch your business grow!
- **Property Management Systems** – Are all your eggs in one basket? Diversity your income streams as the market evolves by adding property management to the mix. Discover the strategies used by coach, **Bryan Chavis**, to ensure passive income flows toward you now and throughout your retirement years.
- **Dominate Your Market** – Do you steer clear of FSBO and Expired opportunities because you're not quite sure what to say to set qualified listing appointments? Coach **Jackie Kravitz** guides you in taking control of your business by mastering the scripts, tools, strategies and mindsets of mega listing agents to dominate your market!
- **Fierce Conversations** – Contrary to the nursery rhyme, words can hurt worse than stick and stones. Words can also heal. Conversations *are* relationships and every aspect of our lives succeed or fail gradually, then suddenly, one conversation at a time. How many people do you speak with in a day? Do the conversations always go well? Learn from coach, **Debbie Frapp**, how to transform the conversations central to your success by mastering positive change through powerful conversation, self-discovery and discover how to strengthen relationships while tackling tough issues.
- **Health and Wellness** – Are you at your personal best? Learn from coach, **Nina Rowan**, how to maximize your energy, gain power and accomplish more in your life using life-transforming techniques.
- **Language of Sales** – Did you know that what and how you say something is more powerful in influencing people than your track record of success? Coach **Joel Rico** leads you to discover the words, tonality and patterns that inspire people to say YES to doing business with you.
- **Leveraged Lead Generation** – Does your business suffer from the dreaded Feast or Famine syndrome? Coaches **Tim Heyl** and **Sam Monreal** share the two most basic yet elusive factors in real estate: rigorous prospecting and lead follow-up. When done correctly and consistently, your pipeline will be full and your business booming!

- **Mega Buyer Agent Skills** – Have you had a buyer that would not commit to you or a great property? Coach **Shon Kokoszka** shares the necessary skills, language and systems with you to successfully increase sales and become a top buyer agent.
- **Mega Listing Skills** – Build confidence and learn to work powerfully with sellers to go from that first “YES!” to receiving referrals for the next twenty years, or more. Coached by **Doris Carlin** and **Ron Wexler**.
- **Model Your Way to a Million** – How's your plan to reach a million dollars in annual GCI working? It comes as no surprise that the models outlined in Gary Keller's *The Millionaire Real Estate Agent* are a proven path to big business. Learn the fundamentals from coach, **Chris Suarez**, to create a personalized and sellable business model created around MREA concepts to make your dream of being a millionaire your reality.
- **Power Profit with Buyer Teams** – Does the showing assistant model have you confused? Take your business to the next level by implementing proportional systems and models taught by coach, **Aaron Armstrong**, to create a successful buyer team.
- **Productivity, Profitability, Growth & Culture** – How can you develop a triple crown ALC and maximize your market center profitability? These bi-weekly webinars and “live” agent calling sessions led by coaches **Rich Rector** and **David Jones** give you the keys to create your powerful ALC.
- **Pursuit of Profit Share** – How many passive streams of income do you have? Have you heard about the Keller Williams profit share system but really haven't investigated it? Take the time to learn with coach, **David Jones**. It could change your bank account and future. Learn about the profit share tree, how to build it and completely understand the power of the Keller Williams Profit Share system.
- **Steps to Kellerization** – Are you new to Keller Williams and feeling a little lost with the lingo, the tools and models? Gain a deeper sense of connectivity to the company as coach, **Terrie Foster-Nowland**, exposes you to a fundamental overview of the systems, tools, models and the language of our business as a whole and the Keller Williams' culture. Directly aligned with the Growth Initiative, this program solidifies the KW value proposition as a training and consulting company built into a real estate franchise. *This program accepts enrollments at any time.*
- **The One Thing** – Are you being pulled in a million different directions: so much to do, so little time, leaving you feeling completely overwhelmed? Achieve extraordinary results in every situation by developing your personal ONE thing. Coach **Shon Kokoszka** shows how to concentrate on your goals, dismiss distractions and build success one thing at a time.
- **The Perfect Real Estate Assistant 101** – Thinking of hiring an assistant or have an assistant you simply don't have time to train properly to become irreplaceable? If your business is running you,

have **Monica Reynolds** coach you and your assistant on structuring, operating and managing the many aspects of your business.

- **The Perfect Real Estate Assistant 201** – Are you ready to take the next step to become the perfect assistant and help build a great team with systems and models? In this advanced course, coach, **Monica Reynolds**, teaches how to take your Policy and Procedures Manual to the next level of completion. Prerequisite: The Perfect Real Estate Assistant.
- **Total Recruiting Solutions** – Master the language of real estate (20-10-40), recruiting, technology, and Market Center numbers with the Total Recruiting Solutions: the all-inclusive Market Center support program coached by **Rich Rector, Mike Bastian** and **Chris McNamara**.

Most programs range between \$297-\$396 or \$119/month.

BOLD

Every year more than 10,000 agents attend BOLD who consistently say, “BOLD changed my business and my life.”

Bad habits . . . and good habits . . . take time to develop. 66 Days. BOLD conditions participants on how to think and act bold, completely redesigning their business, life and earning potential.

Participants benefit from:

- Overcoming limiting beliefs
- Learning to deliver powerful scripts
- Building an abundance of leads
- Incorporating time-saving strategies
- Discovering the benefits of a life by design
- Aligning Conscious and Unconscious minds to obtain goal

BOLD is delivered in local markets by a coach who has been carefully selected and trained by Dianna Kokoszka herself.

BOLD is effective:

- BOLD participants average 14.02 contracts during the seven-week course. (2014 year average)
- Since its inception in 2009, 43,433 agents have graduated from BOLD.
- During BOLD, you condition yourself to adopt the mindset and the activities that allow you to cut through the clutter and go straight to your dreams.

BOLD attendees accomplish the following:

- Overcome limiting beliefs that are unconsciously holding participants back.
- Learn how to deliver powerful language that naturally influences people to work with agent.
- Learn the best ways to work with FSBOs, expired listings, farm areas, just listeds, just solds, past clients, asking for referrals and answering an ad or sign call.
- Develop an effective listing presentation and buyer presentation.
- Build an abundance of leads flowing into business.
- Incorporate time-saving strategies and techniques that take agent's business to the highest levels.
- Schedule and prioritize more effectively.
- Actually make calls, set appointments, and close contracts!

MAPS tracks the numbers as a result of BOLD that assists tremendously. For instance:

- Improvement in production of all agents
- Improvement in recruiting numbers

The ideal BOLD class size is between 50–110 students, with a minimum of 40 required to have a coach on-site. BOLD typically takes place in seven sessions over eight weeks—more than enough time to develop the good habits that lead to BOLD success. Since its inception, BOLD has expanded to include:

- BOLD Experience
- BOLD Leader
- BOLD Technology
- BOLD for Business

BOLD Experience

Business Objective: A Life by Design

Knowing that the conscious mind is the “goal setter” and the unconscious mind is the “goal getter,” BOLD was written by Dianna Kokoszka in a way that allows the conscious and unconscious to align. Like Tony Robbin's teachings, it all begins with the mindset. Over seven weeks, agents are taught and conditioned with mindset, scripts, listing presentations, buyer presentations and more that propelled Kokoszka's own million-dollar real estate career and secured her place as the industry's “queen of systems and scripts.”

Dianna has sold more than 4,000 homes and she brings that knowledge to agents through the BOLD experience so they too can experience massive success.

Investment: \$799 - \$899

BOLD Leader

BOLD Leader increases your leadership skill.

This breakthrough program is about getting on the path to become the type of world-class leader that becomes a magnet for the best talent, and becoming the magnet means unlocking the very best that lies within each one of us.

BOLD Leader begins by looking inward. Once the realization that the energy created governs the energy and circumstances of attraction into their lives, agents can begin to leverage the full spectrum of their power. This breakthrough program is about leading from the heart. It's about joining hands to become part of something bigger. And it's about getting on the path to become the type of world-class leader that becomes a magnet for the best talent out there and the very best that lies within each one of us. BOLD Leadership is delivered in three, separate two-day sessions.

Session 1: Unleash Your Abilities; Maximize Your Results. Agents will experience massive transformation around their relationships, creating results and experiencing confidence in their ability to influence. Participants will be able to spot a fixed mindset and how to open people to accept change. Learn a three-step technique of getting into someone else's world, and how to move them forward. Additionally, learn the Pillars of Leadership, the net forward energy ratio, how 55 percent of communication is happening in front of others, and receive powerful recruiting scripts.

Session 2: Inspire Action and Get Results Now through Communication. Learn to increase charisma, energy and communicate powerfully using language patterns that influence others, tie-downs, embedded commands, keyword backtracking, and much more!

Session 3: Be a Distinctive Leader and Grow the Leaders Around You. Learn the 5 Levels of Leadership, the difference between managers and leaders. How to increase the effectiveness of a team, develop leadership, as well as develop the leadership in others.

BOLD Technology

This one day up-to-date course helps agents understand what is happening in technology today.

Week 1: Overcome your limiting beliefs in the social media genre.

YOU will focus on mindset and the Internet state of mind.

Day #1 includes the following:

- Learning how to integrate Internet and technology into the business
- Understanding the virtual customer
- Making an Internet business plan around existing business
- How to create, manage and run pay-per-click campaigns
- The most effective sources of classified advertising online and generating real leads
- Getting social for prospecting, farming and building a brand image (includes Facebook, Twitter, blogging and YouTube)
- SEO – dominate the search engines and be on the first result page for what buyers and sellers are searching

Week 2: Virtual class taught by three tech coaches. Accountability: Hands-on building of business plans based on teachings in week 1. Get the traffic, get the leads.

Week 3: Virtual class taught by three tech coaches. Accountability: Leads are coming in. Now what? Implementing follow-up systems, scripts and auto-technology to get the appointment with Internet buyers and sellers.

BOLD for Business

BOLD for Business – Sales Performance

Designed to increase the productivity of all sales people within organizations outside of the real estate sales industry. Participants will increase their production and profitability using the BOLD sales techniques that propelled Dianna and Shon Kokoszka's million-dollar careers. BOLD for Business conditions participants with powerful mindset exercises, language of sales techniques and lead generation activities.

- Overcome your limiting beliefs
- Learn how to deliver powerful scripts
- Build an abundance of leads
- Incorporate time-saving strategies
- Discover the benefits of a life by design
- Align your conscious and unconscious minds to obtain your goals

With over 50,000 graduates of the BOLD program, participants on average have experienced these results.

- Sold 166% more dollar volume
- Sold 176% more units
- Made 169% more in gross commission income

This transformative program increases sales and profits through the relentless pursuit of leads, conversion strategies and business-building

activities. BOLD gives you the tools to be successful and holds participants highly accountable to take the appropriate actions to form the success habits of extraordinary sales people.

BOLD for Employees – Career Trajectory Enhancement

Jim Rohn said, “You are paid in direct proportion to the service you provide.” BOLD for Employees is designed to get the heart of your organization (employees) to embrace the power of that statement. Participants have experienced a substantial improvement in mindset and productivity by living the BOLD laws. By getting participants to buy into the BOLD concepts, graduates have a positive and substantial impact on an organizations culture. BOLD enables participants to think bigger and recognize that 20% of their activities yield 80% of their results. BOLD trains and conditions them to focus on the 20% activities and give an inordinate amount of time to the tasks that will move the needle for their position and for the organization. Graduates of the BOLD for Employees program have:

- Improved confidence
- Enhanced team performance and communication
- Eliminated drama
- Became more valuable to the organization
- Implemented time efficiency and time blocking strategies
- Gained clarity on long term vision and strategy
- Eliminated victim language

Every position in every organization has a measurable way to prove success. BOLD participants gain awareness of that matrix and track their progress throughout the 4 weeks of BOLD.

www.mapscoaching.com

512-327-3070

800-784-6826

Productivity Coaches Coaching

Even the best coaches need a coach. As Dianna says, “You must drink the water you intend to sell.” After all, if you don’t believe in having a coach, how can you inspire others to have one? The Productivity Coaches Coaching program gives Productivity Coaches one-on-one attention with a specially selected “coach’s coach.”

Participants do the following:

- Learn how to drastically increase agents’ productivity
- Implement the strategies and principles in the Productivity Coach’s Gamebook

- Experience powerful coaching in mindset, skills and discipline with high accountability
- For PCs, OPs and TLs
- \$450/month
- Four people on 3 calls per month
- One 1-on-1 coaching call per month
- Free call third Monday of each month

MCA Coaching

The MCA Coaching program matches MCAs with hand-picked MCA coaches. Participants are coached on:

1. Growth Initiative items
 2. Discipline and time-management skills
 3. How to be accountable to budget and forecasting models
 4. How to manage staff, systematize the office, communicate with agents and get along with everyone in the office
- For MCAs
 - \$149/month
 - Four people on weekly calls

Mega Agent Expansion

Expansion Systems Orientation (ESO) teaches successful, productive agents how to consistently and predictably grow teams by expanding into additional Market Centers using proven models and systems.

Explorer Level – Step 1

This is the foundational level of expansion. Everyone, no matter what their level of production or expansion aspirations will apply to the Explorer Level.

- Learn the ins and outs of Expansion—webinars, training, networking and invitations to exclusive Expansion events
- Monthly training call
- Special webinar presentation of *6 Business Disciplines* presented by Gary Keller
- Exclusive Explorer Level breakout sessions at Family Reunion, Mega Camp and Masterminds
- Facebook Group
- \$1,000 a year

Expansion Systems Orientation (ESO) – Step 2

A course that teaches successful productive agents how to consistently and predictably grow teams by expanding into additional market centers using proven models and systems.

- Teaches the models, systems and processes of Expansion
- Covers Myths about Expansion
- Learn When, Where and With Whom to Expand – Smart Expansion
- Apply Gary Keller's *Business Snapshot to Broaden Your Focus*
- Learn the Economics of Expansion
- Discover how to build the organizational model
- Create massive lead generation to fuel the expansion
- \$399

Expansion Level – Step 3

When an agent is ready to launch into a new market, it's time to apply for expansion level for each additional location.

- Provides financial, organizational and administrative systems for setting up Expansion Teams
- All benefits of the Explorer Level
- Receive cutting-edge models and systems for expansion teams in *Expansion Systems Manual*
- *Two 2-day mastermind sessions with Gary Keller and Kristan Cole*
- Exclusive Explorer Level breakout sessions at Family Reunion, Mega Camp and Masterminds³
- Facebook Group
- \$3,000 a year per location

³ Masterminds outside of MAPS events incur additional charge

KW MAPS Events

Seminars and Events

Agents and leaders learn more by getting out of their zip codes. Seminars and events give them that opportunity.

Masterminds

With a focus on collaboration and leveraging other people's experiences to create breakthrough ideas through the mastermind facilitator process. Masterminds give practical, tried-and-true ideas and solutions that agents can implement immediately when they return to their Market Center.

The sessions offered include the following:

- Agent
- Team Leader
- Operating Principal
- Technology
- MCA
- Productivity Coaches
- Farm and Ranch
- Luxury Homes
- Expansion

Mega Camp

Agents and leaders learn more by getting out of their zip codes and Mega Camp gives them that opportunity. Each year in Austin, Texas, typically in August or September, Gary Keller, Mark Willis, Mary Tennant, John Davis, Chris Heller and Dianna Kokoszka meet with the best-of-the-best agents and Market Center leadership from all over the world. These super-achievers share their strategies, systems and practices for mega-success that agents can take back and apply in their own marketplace.

Sessions include the following:

- Mega Agent Camp
- Mega Leadership Camp
- Mega Tech Camp
- Masterminds

Recharge

A next-level leadership experience for those KW associates truly committed to growing their leadership. Exclusive networking and mentoring with KW's executive leadership team and top American business leaders. Intimate environment (limited to only 200 attendees) designed to build powerful connections among attendees and speakers.

Investment: \$3,750

Mastery Clients: \$3500

Coaching Skills Camp

The questions you ask determine the answers you get. KW MAPS Coaching Skills Camp shares the secret coaching models, including learning how to ask powerful questions. This three-day camp is directed by KW MAPS Master Coach Dianna Kokoszka and teaches the skills needed to achieve top productivity from coached agents.

- How to ask great questions
- Getting teams to the right mindset
- Models and systems
- The power of words and habitual patterns
- Role-plays on coaching
- 100 percent effective questions and exercises to break through limiting beliefs
- Workbook with proven strategies
- Networking reception

Investment: \$799

Advanced Coaching Skills Camp

KW MAPS Advanced Coaching Skills Camp takes what was learned in Coaching Skills Camp to a whole new level. Advanced Coaching Skills Camp is a three-day camp directed by KW MAPS Master Coach Dianna Kokoszka giving the skills and systems to maximize productivity. This intensive training shares the most up-to-date strategies developed by KW MAPS Coaching experts. Attendees must have completed Coaching Skills Camp a minimum of three times before registering for Advanced Coaching Skills Camp.

Investment: \$999

Power Prospecting Workshop

The Power Prospecting Workshop gives agents the unique opportunity to experience live coaching and support while prospecting for new leads. A MAPS Coach listens in on the calls and assesses performance in 10-12 areas, coaching agents on the ones that will make the greatest impact on their prospecting results, and taking the fear out of prospecting!

As a result of this program agents naturally use scripts more effectively to:

- Increase closing ratio
- Reduce fear of rejection
- Learn to overcome objections
- Set more appointments
- Generate more leads and sales

Investment: \$395

Recruiting for Rockstars Workshop

Ever wonder why recruits just don't get KW and all that's offered? Have you found after your presentation that they want to think it over? This workshop focuses on the activities, scripts and tools needed, including John Davis' Growth Initiative scripts, models and systems, to exponentially *grow teams*—and it holds TL's accountable immediately through “real-play” exercises.

The Recruiting for Rockstars Workshop can be presented in either a one- or two-day format.

- Key Components of online recruiting strategy, including social media
- Needs Analysis
- Understanding the recruiting mindset
- 2-10-40 Growth Initiative
- The proven ten-step recruiting presentation demonstration that has enabled Team Leaders to recruit Cappers and Mega Agents
- Objection-handling and closing demonstration (scripts provided)
- 45 minutes of live prospecting and appointment setting
- Instantaneous feedback and coaching while prospecting
- Lead follow-up system
- Exit interview and agent transition road maps
- Master the value proposition of eEdge to recruit at the highest level.
- Best practices for sorting and grouping contacts in eEdge.
- Exercises to show agents the eEdge WOW factor.
- Starting eEdge 33 Touch to grow Market Centers.
- Create synergy in recruiting efforts using eEdge, scripts and dialogues.
- Creative solutions for working with your eEdge Ambassadors.

- How to respond to eEdge objections.
- How eEdge plays into the complete on-line recruiting strategy.

Investment: \$299

Expansion Systems Orientation

Expansion Systems Orientation (ESO) teaches successful, productive agents how to consistently and predictably grow teams by expanding into additional Market Centers using proven models and systems. The audience for this course includes agents seeking to learn more about whether and how to expand, Market Center Leadership (OP/TL/MCA/ALC) pursuing a better understanding of expansion and their Market Center, and Agents who may be interested in working with an expansion team.

This 2-day course teaches:

- Smart Expansion: When, Where, and With Whom to Expand
- Common myths about expansion
- Applying Gary Keller's Business Snapshot to Broaden the Focus
- The Economics of Expansion
- Building the Organizational Model
- Fueling the Expansion with Massive Lead Generation
- Essential Leadership Skills and Methods for a Multi-Location Business
- \$399 Investment

KW MAPS – OTHER PROGRAMS

KW Young Professionals

Keller Williams has already set the standard for the real estate industry and now, through KW Young Professionals, is setting the industry standard for young associates. The KW Young Professionals Division is preparing the future leaders of Keller Williams to carry forth the company mission while preserving and strengthening the unique company culture.

Resources and training were developed to respond to a trend of people moving into leadership roles at much younger ages

KW Young Professionals cultivate future leaders by developing leading-edge events with an emphasis on sharing innovative techniques, encouraging growth into leadership and supporting key advocacy issues for the industry.

Other benefits of membership include:

- Monthly one-hour live webinars with Keller Williams executives or MAPS coaches

- Monthly video segments featuring top producing young professionals who are sharing their keys to success
- A monthly wellness video segment with MAPS Health and Wellness Coach Nina Rowan Heller interviewing a featured young professional on the role wellness plays in peak performance
- Members-only programming and networking events at Family Reunion
- Members-only networking events at Mega Camp
- International networking and referral opportunities
- KW Young Professionals t-shirt
- And a members-only online community (coming in 2015)

As member Matt Aitchison of Aitchison & Adams in Roseville, California says, “You are the sum of the people you hang around and there is no better group to be around than those who are pushing the industry forward. That group is KW Young Professionals.

Annual Investment: \$799

KW MAPS Systems and Tools

KW MAPS Power Hour



Power up with KW MAPS Daily Warm-Ups. The idea is simple. Each morning between 9:00 a.m. and 11:00 a.m., join every member of the Keller Williams family as well as some in the business community, start the day with Power Up followed by script practice and then an hour of focused lead generation.

Download the Facilitators' Guide to get started!

(<https://secure.kw.com/kwu/content/sitemap.jsp>)

Investment: FREE

KW MAPS App



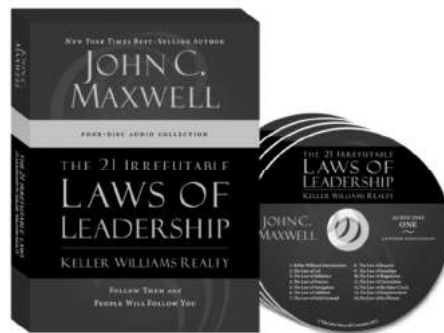
Download the KW MAPS App for your smartphone!

(<https://itunes.apple.com/us/app/keller-williams-realty-real/id652512924?mt=8>)

Get daily power ups, scripts and much more from Dianna Kokoszka with the MAPS app for Android and iPhone.

Investment: FREE

The 21 Irrefutable Laws of Leadership, Keller Williams Realty



This customized four-disc audio collection features John Maxwell's 21 Irrefutable Laws of Leadership and their direct application to the success of the real estate professionals of Keller Williams Realty. Keller Williams leaders share what they have learned about each of the laws in interviews with John Maxwell. Listen and take these lessons to heart so that you can become a more effective leader in building your real estate business.

Available at KW Store.

(<http://mapscoaching.kw.com/21-irrefutable-laws-leadership>)

Investment: \$50

MAPS Achiever



MAPS Achiever is a collaboration between Keller Williams Realty and *SUCCESS* magazine. The subscription program provides direct access to content on leadership, business, communication and personal development. With MAPS Achiever, you will get 24/7 access to:

- Monthly audio/video interviews with KW's most successful leaders
- Digital editions of *SUCCESS* magazine, including archived editions
- Book summaries from people like Dave Ramsey, Jim Rohn, Brian Tracy, Jack Canfield and many more ...
- Thousands of hours of downloadable audio and video recordings on business, leadership and building relationships with John Maxwell, Jim Rohn, Zig Ziglar and others
- Daily *SUCCESS* quotes to inspire and challenge you

Investment: \$19.95/month

Subscribe [here](http://mapssuccess.com/)

(<http://mapssuccess.com/>).

Productivity Coach Game Book



100-day ramp up operations manual for Productivity Coaches to ensure the success for the PC and their clients.

Investment: \$299

Agent Play Book



100-day ramp up operations manual for Agents that includes what to do, day-by-day, to ensure a successful beginning in their real estate career.

Investment: \$50

BOLD Script Books



Script books developed to ensure agents know what to say when when booking appointments, going on listing appointments and more. Agents learn what to say, when to say it and how to deliver it, making the difference between failure and success in their real estate career.

Investment: \$50

Regional Training Schedule

In addition to the training offered through KWU and KWConnect, your Region should have a robust training schedule that provides Market Center leadership and associates with the ability to attend KWU classes in a location closer to home. Your calendar should take into account key KWRI dates, important local events, and other Regional meetings. A sample calendar appears below.

Event	Frequency
RSTLM	Yearly
ALC Clinic	Yearly
OP Boot Camp	Yearly
Recruiting Great Agents (Team Leader Boot Camp)	Yearly
Keeping Agents First (Retention)	Yearly
MCA DRIVE	Yearly
MC Financials	Yearly
Win with Buyers	Yearly
Win with Sellers	Yearly
Train the Presenter; Train the Trainer Advanced	Every Other Year
Mega RSTLM Certification	Every Other Year
BOLD	Ongoing

Note: If you are unable to offer the classes within your Region on a given year, you may include the Austin, Texas, dates on your calendar.

KWU Instructor Requirements

Market Center Trainers

Market Center trainers are approved locally by their Team Leader (TL). The TL is the most qualified leader to determine and assist potential trainers at the Market Center level. However, KWU does provide a recommended learning path for Market Center trainers and certifies those who complete the curriculum.

Recommendations

Market Center trainer should start by taking “10 Steps to Train Tomorrow,” a self-paced, online course that will orient them to training KWU materials (search for this course on myKW, KWConnect).

It is highly recommended that Market Center trainers attend Train the Presenter* (a one-day course with an optional second-day workshop) taught by International Master Faculty trainers. Please note that this course is required if a trainer pursues KWU Approved Trainer certification and must be taken if the trainer wants to attend Train the Trainer Advanced Workshop.

It is also recommended that Market Center trainers attend the Train the Trainer Advanced Workshop at least once. Those who complete both classes will be certified as Market Center trainers.

Trainer Evaluation

All Market Center course evaluations will be maintained at the Market Center. Trainers should collect course evaluations for their own development.

*All associates who have taken the Train the Trainer I course will receive credit for the new class, Train the Presenter.

KWU Approved Trainers

KWU Approved Trainers are certified through KWU. Trainers at this level have the opportunity to train in any Region to which they are invited. They will be marketed on the KWU website and will be invited to faculty program events. Becoming certified means that a trainer has met KWU’s criteria and is recognized by Regional leadership for their teaching skills and talent. It means that KWU is confident that a trainer can deliver KWU courses in an engaging and effective environment so that the lessons can immediately be applied to associates’ businesses and lives.

Requirements

- Complete Train the Presenter, taught by an International Master Faculty trainer.
- Complete the Train the Trainer Advanced Workshop, taught by an International Master Faculty trainer, AND receive the Master Faculty instructor's recommendation to the program. (Please note: This may necessitate taking the Train the Trainer Advanced Workshop multiple times.)
- Obtain a letter of recommendation from your Regional Director.
- Complete the KWU Approved Trainer Application (found online on myKW, <http://kwu.kw.com/kwu/approvedtrainers>).
- The application includes a 360-degree review process.
 1. The review includes feedback from International Master Faculty, KWU Approved Trainers, and Regional Directors (completed by KWU and KW Leadership).
 2. It also includes three Team Leaders whose Market Centers the candidate has taught in.
 3. Candidates names are sent out monthly via email with a link to SurveyMonkey for peers and leadership to report.

Trainer Evaluation

- Course evaluations at the KWU Approved Trainer level are collected by the ROM for Regional events.
- Trainers should collect their own evaluations for courses conducted at Market Centers to keep for their own training development.
- Course evaluations collected by the ROM from Regional events will be entered into a Trainer Success Report Card database consolidated at KWU monthly. KWU and Regions will have the ability to track results of training events, trainer results, and course results.

International Master Faculty

International Master Faculty is a unique designation granted to those who have proven themselves to be exceptional trainers, icons of Keller Williams Realty, and ambassadors for KWU at the highest level. Master Faculty trainers will be marketed on the KWU website and will be invited to Faculty Program events, as well as be afforded unique teaching opportunities and opportunities to provide input into KWU course content.

Designation Requirements

Because International Master Faculty is a granted designation rather than an earned certification, there is no formal process for a candidate interested in the designation to complete. The best path for a trainer to take is to continue teaching in as many locations as possible – building both name recognition and reputation as they hone their skills.

However, there are clear standards KWU's Faculty Program evaluates when recognizing new Master Faculty members. Please note that the steps below are taken confidentially.

- Each quarter, a request for nominations is sent out to KWRI, regional leadership and current Master Faculty. This community is asked to share the names of any individuals they have identified as exceptional trainers, as well as icons and ambassadors.
- If a trainer receives five nominations from this community, he or she officially becomes a candidate for review.
- KWU's Faculty Program then considers the history of success as a KWU trainer (as evidenced through the Trainer Success Report Card) and sends the candidate's name out for a 360-Degree Review, where as much feedback as possible is collected from the KWRI, regional and faculty leadership on the Master Faculty criteria (exceptional trainer, icon, ambassador). If the candidate does not pass the 360-Degree Review, they will be asked to start the process from the beginning.
- Once the above is met, the candidate will be required to audition at either Mega Camp or Family Reunion on an invitation basis.

KWU's Faculty Program will notify candidates who have been recognized as Master Faculty and celebrate and promote their designation.

Trainer Evaluation

- Course evaluations at the International Master Faculty level are collected by the ROM for regional events and by KWRI events staff for international events.
- Trainers should collect their own evaluations for courses conducted at market centers to keep for their own training and development.
- Course evaluations collected by the ROM or KWRI events staff will be entered into a Trainer Success Report Card database consolidated at KWU monthly. KWU and regions will have the ability to track results of training events, trainer results and course results.

Mega RSTLM™ Certified Trainers

Mega RSTLM™ Certified Trainers are authorized through KWRI to teach the Mega RSTLM series in their Market Center. The Mega RSTLM series abridges the full version of RSTLM and is intended as a first step toward developing mastery in this powerful system. Only certified trainers may teach Mega RSTLM.

Requirements

- Complete “10 Steps to Train Tomorrow” (20-minute, online module on KWConnect).
- Complete Train the Presenter through Keller Williams University.
- Complete the full Recruit-Select, Action Training, and Leadership and Motivation curriculum.
- Obtain recommendation of Regional Director.
- Be a Market Center Leadership member (including ALC members).

RSTLM Curriculum

FULL RSTLM Series (offered in Regions)

The full Recruit-Select (2 days), Action Training (1 day), and Leadership and Motivation (1 day) classes are designed for Mega Agents and Market Center leadership to learn the proven systems of attracting and developing talented teams. RSTLM may be offered at the Regional level by select Master Faculty only.

- Choose your trainer. Only select Master Faculty may train the full RSTLM series. You can search for a trainer here:
<http://kwu.kw.com/kwu/findatrainee>
- Set up registration for your class by calling the KWRI Events team at 512.306.7184 or emailing kwu@kw.com. The Events team will help enable your online registration links and send reminders for materials ordering.
- Order your materials. Per the reminders provided by the KWRI Events team, orders for your materials must be provided no later than one full week prior to your event’s start date in order to not incur additional shipping expenses.

- After the class, confirm the final attendance number and names. All walk-in registrations will need to be sent to the Events team at kwu@kw.com for roster finalization and generation of the event's reconciliation report. Once finalized, the roster will be sent to Corporate Consulting who will in turn email the associates links with access to now order AVAs.

Mega RSTLM (offered in MCs)

Mega Recruit-Select (1-day), Mega Action Training (1/2 day), and Mega Leadership and Motivation (1/2 day) are specifically focused on agent needs in developing a team. Market Centers must use a KWRI-certified Mega RSTLM Trainer and purchase the Mega RSTLM materials through KWU.

Here's what you need to do:

- Choose a Mega RSTLM Certified Trainer. Only KWRI Certified Trainers may teach Mega RSTLM. For a list of trainers, visit Keller Williams University at <http://kwu.kw.com/MegaRSTLMTrainers>
- Set up registration for your class. Each of the three classes in the Mega RSTLM series costs \$50 per student. This cost will cover their materials and ground shipping, as well as provide the participant authorization to order AVAs. You may use whichever registration system you prefer. If you have additional costs, you will need to add them into your ticket price.
- Order your materials through KWU Customer Service at 512.306.6236 at least five business days before the class. KWU will place your order and provide you with a unique code for each set of materials purchased. Every student must be assigned a unique code to receive credit and authorization to order AVAs. The materials may not legally be photocopied. You may want to order several sets of extra materials in case you have late registrations. Please note: Materials that require expedited shipping will be charged shipping costs.
- Host an amazing class that wows!
- Submit your roster to KWU using the template provided. KWU will ensure that all participants receive proper credit for the course and are given access to order AVAs through Corporate Consulting. If you had more participants in your class than books, you will need to call KWU to order their materials and codes (even if after the class). If you do not use all of your materials and codes, you may save them for a later offering.

Please note: The above procedure applies only to Mega RSTLM. The full version of RSTLM will continue to be taught by KWU Master Faculty and offered through our Regions.

Mega RSTLM Certification Class

The Mega RSTLM Certification class offers Market Center leaders the opportunity to become certified to teach the Mega RSTLM courses at the Market Center level.

- Choose your trainer. Only select Master Faculty may train the Mega RSTLM Certification. You can search for a trainer by searching here: <http://kwu.kw.com/kwu/findatrainner>.
- Set up registration for your class by calling the KWRI Events team at 512.306.7184 or by emailing kwu@kw.com. The Events team will help enable your online registration links and send reminders for materials ordering. Before you send the link to any individuals to register, you will need to confirm they've met ALL of the prerequisites:
 - Member of leadership (including ALC)
 - "10 Steps to Train Tomorrow" (KWConnect)
 - Train the Presenter
 - Attendance at the FULL RSTLM series, taught by our Master Faculty
 - Recommended by the Region
- Order your materials. Per the reminders provided by the KWRI Events team, orders for your materials must be provided no later than one full week prior to your event's start date in order to not incur additional shipping expenses.
- After the class, send your final roster to kwu@kw.com. We will send the participants the required assessment and trainer covenant to complete their certification process.
- Once certified, trainers will be posted on the KWU website at <http://kwu.kw.com/MegaRSTLMTrainers>.

Regional Meeting—Sample Instructions

Each quarter there are two meetings held at a Regional level:

1. The Regional Leadership meeting, which includes the Regional Leadership, Regional Operations Manager, all Team Leaders, and MCAs Region-wide.
2. Regional ALC Meeting which includes the Regional Leadership, Regional Operations Manager, and all Team Leaders with their Regional ALC Rep.

These meetings are held on the same day, back to back.

Preparation

1. One week before meetings, order breakfast and lunch.
2. The tables should be set up in a U-shape. There should also be a flip chart and a CD player.
3. Assemble agenda and handouts for each meeting. Take all Regional and International policy materials for reference.

Follow-Up

1. Type the minutes, secure Regional Leadership approval, and distribute to MCAs and Team Leaders.
2. File a copy of the agendas and minutes appropriately.
3. Track all invoices and expenses.

Daily Schedule

8:30 a.m.	Arrive and set out agendas
9:00 AM – Noon	Regional Leadership Meeting
10:30 a.m.	MCA's Break Out Session
Noon	Lunch
1:00 p.m. – 3:00 p.m.	Regional ALC Meeting

ALC Clinic

Delivery time (total): 2 days

- Day One: ALC class for Market Center leadership required for OPs, TLs, and MCAs
Focus on leadership of powerful ALCs.
- Day Two: ALC clinic for ALCs required for all ALC members, TLs, OPs, MCAs, and all associates are encouraged to attend
Focus on helping ALC members achieve personal and professional goals.

Note: This is a two-day class. Both days must be taught in order to meet the standard required for our Regions, annually.

Annual Requirements:

Each Region is required to schedule the clinic in their Region by May 31 every year. Classes to be completed by December 31.

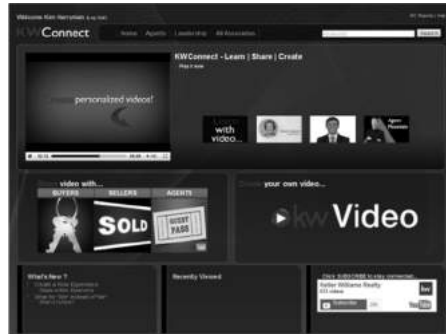
The clinic must be conducted by one of the following instructors:

Mo Anderson	mo@kw.com
Todd Butzer	tbutzer@kw.com
Kay Evans	kayevans@kw.com
Sherry Lewis	sherry@kw.com
Holly Prescott	hollyp@kw.com
Beverly Steiner	beverly@beverlysteiner.com
Mary Tennant	tennant@kw.com
Bruce Hardie	bhardie@kw.com
Georgia Alpizar	georgiaonmymind@kw.com
Brenda Benson	bbenson@kw.com

KWConnect

Welcome to the power of KWConnect—Keller Williams Realty’s world-class online training resource.

www.kwconnect.com



KWConnect gives you, and your associates, the skills you need to stay ahead of the market and your competition.

- On-demand training anywhere in the world—24/7! (with an Internet connection)
 - On-demand access for the Market Center
 - Free at-home access for all Market Center associates
- Cutting-edge videos, audio downloads, and interactive education

Some of the most powerful resources on KWConnect include:

1. Sales Skills Training
 - Buyer Consultations
 - Listing Presentations
 - Business Planning
 - Mindset
2. Technology Training
 - eEdge
 - Social Media Tips
 - KWLS and Greensheet
 - Agent Websites

3. KWU Course Supplements
 - Ignite
 - Lead Generation 36:12:3
 - The Six Personal Perspectives
4. Agent Mountain
 - Gary's Mega Agent Interviews



Regional Awards Banquet

The Regional Awards Banquet is held in the first quarter of each year to commemorate the accomplishments of the previous year. Many months of planning go into this event. In this section, you will find a sample time line and examples of sponsorships and invitations.

Awards Banquet Time Line

Thanks to the San Antonio Blanco Road Market Center for this information!

When	What	Examples/Ideas/Notes
+ 12 months	Identify date. Secure location. Arrange catering.	For location: hotels, country clubs
+ 5 months	Pick a theme. Order fliers. Order invitations. Order tickets.	Theme examples: <i>Simply the Best</i> , <i>A Night with the Stars</i> , <i>We Love Our Agents</i> You can print your own fliers, invitations, and tickets fairly inexpensively using special paper and a laser printer. Paper sources include www.baudville.com or www.paperdirect.com .
+ 4 months	Secure sponsors. <ul style="list-style-type: none"> Identify sponsor levels, requirements, and benefits. Print sponsor flier and letter (samples follow). Give Regional ALC members ten and a challenge to secure at least three sponsors. Print tickets and sponsor thank-you card (samples follow). Put tracking and fulfillment in place for sponsors. Secure an emcee. Prepare for silent auction.	Mail to every builder, title company, mortgage company, home warranty company, etc.—be sure to include core sponsors! Use a spreadsheet to track sponsor letters sent and contacts made. When sponsorship is received, record on the spreadsheet and immediately fulfill the sponsorship level. KWU Master Trainer. Delegate this to the Regional ALC!

When	What	Examples/Ideas/Notes
+ 3 months	<p>Print and distribute agent invitations (samples follow).</p> <p>Send out other invitations:</p> <ul style="list-style-type: none"> • Board of Realtor executives • KWRI Leadership <p>Set up mailbox or intranet for RSVPs or create voicemail box.</p> <p>Designate awards.</p> <ul style="list-style-type: none"> • Identify categories and requirements. • Identify awards. <p>Send out award bids to award vendors. Decide on vendor and place order.</p> <p>Confirm all event plans.</p> <ul style="list-style-type: none"> • Catering • Decorations • Audio/visual needs • Presentations and speakers • Auction setup 	<p>Try to have someplace where people can email or call and leave a message. If you can, coordinate through all Market Centers.</p> <p>The awards are the centerpiece of the event. Get agreement with the OPs in the Region about the award categories.</p> <p>The number of awards can increase quickly and there is a substantial markup. Be sure you get competitive bids!</p>
+ 2 months	<p>Identify award recipients.</p> <ul style="list-style-type: none"> • Get data. • Determine recipients. • Send to award company. • If there are awards that are nonproduction related (such as a Spirit award), determine these recipients as well. <p>Identify setup process and whether you need volunteers. If so, secure volunteers.</p> <p>Create slide shows.</p> <ul style="list-style-type: none"> • Opening • Presentation • Awards 	<p>Have the MCAs from the MCs provide the information. After awards are decided, send list to OPs for review.</p> <p>Check, then check again, triple check, and proof once more! Make sure awards and names are correct.</p> <p>A great idea for an opening slide show is to take pictures from the previous year and add music. This can play while people are being seated.</p>

When	What	Examples/Ideas/Notes
+ 1 month	Identify date. Secure location. Arrange catering.	For location: hotels, country clubs
Have a Great Time!		
+ 30 days	Correct and redistribute awards that were printed incorrectly. Send thank-you notes to all speakers and sponsors. Be sure all sponsor money has been collected. Write a summary page for the file with all contact names, numbers, statistics, and samples.	Have the MCAs from the MCs provide the information. After awards are decided, send list to OPs for review. Check, then check again, triple check, and proof once more! Make sure awards and names are correct. A great idea for an opening slide show is to take pictures from the previous year and add music. This can play while people are being seated.

Keller Williams Realty

2015 Annual Awards Banquet

Sponsor Invitation

You are cordially invited to attend

2015 Annual Keller Williams Awards Banquet and Silent Auction

Join us as we commend the associates who comprise the top real estate company in San Antonio and the fastest-growing real estate company in North America. A formal affair with more than 400 of our agent partners, this event is sure to be spectacular!

Friday, February 6, 2015

*6:00 – Cocktails and Silent
Auction*

*7:00 – Dinner and Ceremony
At the Omni Hotel*

9821 Colonnade Blvd.

Silent Auction for Charity

*Also enjoy a silent auction
benefiting Hearts and Hands.*

Items may be submitted to

Jary Sours

before January 26. 210-493-3030

Sponsorship Availability

Platinum \$5,000

- *A table for ten of your guests*
- *Company banner on display*
- *A welcome speech during our presentation*
- *15 complimentary cocktail tickets*
- *Company logo on the slide show*

Gold \$2,500

- *Reserved seating for five*
- *Company banner on display*
- *10 complimentary cocktail tickets*

Silver \$1,000

- *Reserved seating for four*
- *Company recognition at table*
- *7 complimentary cocktail tickets*

Bronze \$500

- *Reserved seating for two*
- *Company logo displayed*
- *3 complimentary cocktail tickets*

Individual Tickets \$150

- *Available for nonassociates. Price includes dinner.*

Awards Banquet—Sample Sponsor Letter

[DATE]

Dear [NAME],

I hope this letter finds you and yours well. As I'm sure you are, I am currently reviewing 2014 and working on 2015 projections and goals. I hope 2015 has brought you as many blessings as it has me and Keller Williams Realty.

Truly, Keller Williams Realty has had an incredible year. Our offices have grown to [#] agents, hold a [%] market share in [REGION] for residential sales, and are recording unprecedented sales.

I would like to take this opportunity to thank you for your support. Over the years, Keller Williams Realty has grown and flourished, thanks in large part to the support of vendors and local companies.

In light of our success, we are planning an Awards Banquet for [MONTH] to celebrate with our associates and partners. I sincerely hope you are able to join us as we thank the team members who have made all of this possible. Sponsorships are still available, though if you feel unable, tickets are now being made available to preferred vendors like you.

Warmest Wishes,

Awards Banquet—Sample Tickets

<i>Keller Williams Realty Awards Banquet Feb. 6, 2015, 6 p.m. Admit One</i>	<i>Keller Williams Realty 2015 Awards Banquet Feb. 6, 2015 6 p.m. Cocktails – 7 p.m. Ceremony Omni Hotel at the Colony</i>
<i>Keller Williams Realty Awards Banquet Feb. 6, 2015, 6 p.m. Admit One</i>	<i>Keller Williams Realty 2015 Awards Banquet Feb. 6, 2015 6 p.m. Cocktails – 7 p.m. Ceremony Omni Hotel at the Colony</i>

These tickets are produced on perforated ticket forms that can be purchased.

Card Front

*Thank You
for Your Support
of the
Keller Williams Realty
2015 Annual Awards Banquet
and Silent Auction*

*This Awards Banquet is the event of the year
and we are glad you will be joining us!*

*Please see reverse for important details
regarding your sponsorship.*

Friday, February 6, 2015

6:00 p.m. – Cocktails and Silent Auction

7:00 p.m. – Dinner and Ceremony

at the Omni Hotel

9821 Colonnade Boulevard

Awards Banquet—Sample Sponsor Thank-You Card

Card Back

Enclosed are tickets for your associates. Please present them at the registration table to receive your allotment of drink tickets.

Anna Velazquez, our accounting department head, is taking care of invoices and payments. Please contact her at kfrw2@kw.com regarding payments or receipts.

Each sponsor table will be marked with your company information. You may want to plan on arriving before 7:00 p.m. to find your table and invite your associates to sit with you.

Sponsors are encouraged to email a .jpg or .eps file of your company logo to kimb@kw.com to be included in the program and slide show.

Also, Platinum and Gold sponsors are encouraged to provide a company banner for display. Please have the banner delivered to our Blanco Road office, or email kimb@kw.com to arrange a pickup. We'll need to have the banners by Monday, January 26.

Lastly, I would like to invite you to a reception immediately following the event. We have arranged for a dance floor and DJ beginning at 10 :00 p.m. for any attendees wishing to stay and dance. This is a surprise for our agents! Please help us keep it confidential until the event.

Please let me know if you have any further questions. You can contact me at 493-3030 x223 or kimb@kw.com.

You are cordially invited to attend

Keller Williams Realty
2015 Annual Awards Banquet
and Silent Auction

Friday, February 6, 2015

6:00 p.m. – Cocktails and Silent Auction

7:00 p.m. – Dinner and Ceremony

The Omni Hotel

9821 Colonnade Boulevard

Silent Auction for Charity

*Also enjoy a silent auction
benefiting Hearts and Hands.*

*Items may be submitted
before January 26.*

RSVP Information



KELLERWILLIAMS®

Annual Culture Summit

The Culture Summit is ...

- An annual event cochaired by Kay Evans and Mo Anderson
- A part of Mega Camp each year
- An honored celebration of the achievements of our Culture Ambassadors
- A vision of an ever-growing and ever-stronger culture as the KW family continues to grow. Each year, we initiate two new Ambassadors into our Culture Army from each Region with the hope that this continually increasing group of leaders will support our culture in the Market Centers as we grow.

A Culture Ambassador is ...

- One whose daily actions contribute to creating an environment in the Market Center that no one would ever want to leave!
- One whose support of the KW culture happens mostly within the Market Center and local KW family “Inside Culture”
- One who also supports the community “Outside Culture,” but this is second to an Ambassador’s “Inside Culture”
- An honored Regional representative
- The recipient of a lifetime appointment
- A general of the Culture Army
- Influential and highly productive

What can Regions do to support the Culture Summit?

- Plan ahead for the selection of Ambassadors each year. Plan to host Regional Culture events that honor Ambassadors locally in advance of the Culture Summit.
- Encourage an Ambassador's TL and OP to attend the Culture Summit.
- Set a standard for Market Center participation/attendance at the event.
- Make sure each Region is represented at the Summit by its RD and Regional OP.
- RSVP to the Culture Summit invitation sent by the vice chairman's office.

What Is Culture?

1. Making decisions that are right for the Market Center, regardless of individual impact
2. Taking a stand on an issue that is not popular, but is right
3. Being the best co-op associate possible; always respecting other associates
4. Helping someone in the Market Center willingly and with a smile, even though you are busy
5. Doing something right without wanting to be recognized or acknowledged for it
6. Paying a struggling associate's fees anonymously
7. Complimenting others regularly
8. Being a part of the solution and not the problem in a Market Center
9. Taking the high road on confrontational issues or points of difference
10. Handling a fellow associate's business when personal or family illness occurs
11. Paying a struggling associate's tuition to a class that may impact the associate's productivity
12. Living up to the covenant if you are on the ALC
13. Representing the Market Center and the company in a positive way—always
14. Smiling at others in the Market Center regularly
15. Staying home if you're having a bad day attitudinally
16. Speaking without profanity
17. Avoiding disparaging remarks about anyone
18. Committing a random act of kindness every day
19. Honoring the policies and protocol of the Region regarding recruiting

20. Giving seven hugs a day
21. Not recruiting associates from another KW Market Center
22. Being willing to walk away from a transaction that compromises your principles
23. Being considerate of the staff
24. Paying your Market Center bills on time
25. Not looking for loopholes in Cap and Royalty payments
26. Responding to clients' calls and concerns in a timely manner
27. Considering the other person's viewpoint before reacting
28. Following the model
29. Being excited about saying, "Would you promise me that you'll take my Team Leader's call?"
30. Implementing the Keller Williams productivity systems
31. Finally creating the budget you know you need for your business
32. Not only learning but living the WI4C2TS
33. Putting God and your family first, and the business second
34. Understanding that the higher purpose of business is to give, share, and care
35. Building your level one Profit Share down line to 15, as soon as possible
36. Lead generating for 3 hours, every day
37. Using a monthly Profit and Loss Statement to analyze your real estate business
38. Hitting your monthly and annual production goals
39. Profitability in your personal real estate business
40. Be nice!

"What Is Culture?" was created by Kay Evans, KWU International Master Faculty member, and Mo Anderson, VCOB, Keller Williams Realty, Inc.

Ten Best Ways to Build Culture in Your Region

By Mo Anderson

1. Culture Story

Every RD should have a personal story that is internalized and shared often.

2. Regional Culture Story

Regional culture stories should be a part of every Region's meetings and events.

3. Regional Inspirational Breakfast

Every Region should host an annual Regional Inspirational Breakfast.

4. Regional Culture Summit

Every Region should host an annual Regional Culture Summit.

5. Cultivate Culture Ambassadors

- Get to know and connect with the Culture Ambassadors for your Region (2006–2014).
- Create a Culture Committee including your Ambassadors to develop cultural leadership in the Region.
- Get involved with the International Culture Summit at a high level.

6. At every meeting in your Region:

- Open with a powerful story.
- End with an inspirational close.

7. KW Cares

- The goal is \$3,000 in DONATIONS to KW Cares from every Market Center annually.
- Identify associates with emergency needs and submit for KW Cares GRANTS.

8. RED Day

Goal is 100 percent Market Center participation in RED Day, annually.

9. Hold to Standards

Be willing to draw a line in the sand and stand for the values and beliefs this company was built upon!

- WI4C2TS
- “What Is Culture?”

10. ALC

Every Regional Director should hold TLs and OPs accountable for development of ALCs.

- Growth = ALC member’s personal downline (15 in level 1, within 5 years)
- Profitability = Personal P&L statement reviewed at each meeting (QuickBooks)
- Production = Personal production goals reviewed at each meeting
- Culture = ALC members are role models, whether they know it or not!

Chapter 4:

Resources

1. KW Economic Fundamentals
2. Reports
3. Sample Procedures and Checklists
for Events
4. The KW Value Proposition
5. KW Cares
6. KW Technology and Marketing
Systems

Notes

KW Economic Fundamentals

1. Lead with revenue, not expenses.
2. Keep debt low and get it to zero.
3. Keep overhead and fixed expenses low.
4. Follow the KW Chart of Accounts and code expenses consistently.
5. Use the high-volume/low-margin business strategies.
6. Offer competitive commission splits that cap Company Dollar on an annual basis.
7. Run a fixed expense budget with very few variances.
8. Get all variances approved in advance of the decision to spend the money.
9. Carefully review your Balance Sheet monthly and Income Statement weekly.
10. Charge rent for offices and desks.
11. Don't carry Agent Receivables. Be a cash-and-carry operation for as many consumables as possible; e.g., office supplies, signs, etc.
12. Bill back for only those consumables that can't be cash and carry; e.g., office rent, copies, technology fees, etc.
13. Be a class operation, but no frills or extravagances.
14. Multiuse as much space as possible; e.g., resource rooms, meeting rooms, day desks, etc.
15. Set up both a Deposit Account and an Operating Account. Put all income into the Deposit Account. Transfer only budgeted amounts into the Operating Account.
16. Capping associates should produce enough income to pay Grand Total Operating Expense. Everyone else is profit!
17. Open the books and provide the ALC with monthly financial reports.
18. Share the decisions.
19. Share the profit.
20. OP can't be TL.
21. Follow the Interdependent Model. Treat your agents and staff as if they were partners.
22. What you focus on improves, so know your key numbers (Vital Signs Report, Listings Taken, and Contracts Written).
23. Feedback is the breakfast of champions; be accountable to the numbers.
24. Profit is not the purpose, but it is the goal and the fundamental measure of a healthy business.
25. What correlates with profit matters (Agent Count, Company Dollar, and Costs as a Percentage of Company Dollar).

Reports

Trends Reports

These reports focus on performance at the agent, Market Center, and Regional levels. Of particular interest to you as a Regional Director are:

- **Agent Multi-year Trends** (Associate Folder) – Provides a detailed view of the performance (contracts, listings, company dollar, etc.) of every agent in your Region.
- **Market Center Multi-year Trends** (Market Center Folder) – Provides a detailed view of the performance (agent count, contracts, listings, company dollar, profit, etc.) of every Market Center in your Region.
- **Regional Multi-year Trends** (Region Folder) – Provides a detailed view of the performance (agent count, contracts, listings, company dollar, profit, etc.) of your Region.
- **Market Center Recruiting Performance** (Recruiting Folder) – Provides the recruiting and removal numbers for each MC in the Region. It also includes production levels for all agents in the MC.
- **Regional Recruiting Performance** (Recruiting Folder) – Provides the recruiting and removal numbers for the Region. It also includes production levels for all agents in the Region.
- **Classic-Goals vs. Actuals** (Market Center Folder) – Compares goals to actual performance for each Market Center within the Region.
- **Classic-Market Center Production** (Market Center Folder) – Lists monthly production for previous and current year by Market Center within the Region.

Sample Region Multi-Year Trends Report

Region Multi-Year Trends

■ Best Year out of last 10

September 2014

Market Center Count

*MOM = Month over Month for Sep - *YTD = Jan - Sep - every year calculates YTD for the same months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Sep	YOY Jan Sep
2007	35	35	36	36	37	37	37	38	38	38	39	39	39		
2011	34	33	33	33	33	33	33	33	33	33	33	34	34	-8.3%	-8.3%
2012	34	34	34	34	34	33	33	33	33	32	32	32	32	0.0%	0.0%
2013	32	32	32	32	32	32	32	32	32	32	32	32	32	-3.0%	-3.0%
2014	32	32	31	31	31	31	31	31	31				31	-3.1%	-3.1%

Total Agent Count

*MOM = Month over Month for Sep - *YTD = Jan - Sep - every year calculates YTD for the same months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Sep	YOY Jan Sep
2010	3,973	4,026	4,062	4,107	4,159	4,175	4,203	4,224	4,248	4,144	4,126	4,014	4,014		
2011	4,022	3,948	3,964	3,944	3,952	3,949	3,939	4,005	3,981	3,998	3,995	3,931	3,931	-6.3%	-6.3%
2012	3,859	3,868	3,893	3,917	3,935	3,906	3,911	3,983	4,037	4,044	4,054	4,082	4,082	1.4%	1.4%
2013	4,053	4,086	4,149	4,212	4,307	4,418	4,538	4,652	4,739	4,859	4,946	5,022	5,022	17.4%	17.4%
2014	5,058	5,157	5,282	5,402	5,502	5,618	5,719	5,849	5,934				5,934	25.2%	25.2%

Recruiting Appointments

*MOM = Month over Month for Sep - *YTD = Jan - Sep - every year calculates YTD for the same months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Sep	YOY Jan Sep
2010	0	0	0	0	0	0	0	0	0	0	0	0	0		
2011	0	0	0	425	402	443	452	590	424	501	412	385	4,034	0.0%	0.0%
2012	534	495	436	585	576	514	547	643	475	770	539	568	6,682	12.0%	75.6%
2013	731	455	605	764	820	954	885	983	906	1,021	884	786	9,794	90.7%	47.8%
2014	971	990	986	1,008	940	959	1,036	1,058	1,042				8,990	15.0%	26.6%

Gross Agent Gain

*MOM = Month over Month for Sep - *YTD = Jan - Sep - every year calculates YTD for the same months

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	MOM Sep	YOY Jan Sep
2006	260	198	327	214	228	196	243	241	201	222	145	164	2,639		
2011	197	87	150	96	108	114	93	175	88	117	95	117	1,437	-41.7%	-17.5%
2012	133	101	137	112	126	161	119	178	155	149	112	134	1,617	76.1%	10.3%
2013	172	138	160	174	184	193	224	225	183	214	173	182	2,222	18.1%	35.3%
2014	276	208	223	246	215	252	241	246	206				2,113	12.6%	27.8%

agent

Region Multi-Year Trends

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Goal Reports

In addition to listing the goals for agents and Market Centers, **Goal Reports** also tell which agents and Market Centers in your Region have or have not submitted their goals for the current year. These reports are located in the **Goals Folder** and consist of

- **Details of Agent Goals** – Provides the Recruiting, Production, Financial, and Statistical goals for those agents in your Region who have submitted their goals.
- **Details of Market Center Goals** – Provides the Recruiting, Production, Financial, and Statistical goals for those Market Centers in your Region who have submitted their goals.
- **Status of Agent Goal Entry** – Allows you to see which agents have or have not submitted their goals.
- **Status of Market Center Goal Entry** – Allows you to see which Market Centers have or have not submitted their goals.
- **Summary of Market Center Goals** – Allows you to see the combined goals of all the Market Centers in your Region.

CEO Reports

The **CEO Reports** are located in the **Region Folder** and show monthly Production, Profit, Profit Share, and Royalty in the Regions. Regional Leadership can compare their Regions to others in terms of

- **Production** – Compares Regions' total numbers for a given month for agent recruiting, volume, units, GCI, etc.
- **Profit** – Compares Regions by the profitability of their MCs and Region.
- **Profit Share** – Compares Regions by the total Profit Share for the month of their MCs and Region.
- **Regional Production** – Compares Regions by the MCs and Region's goals to actuals for a given month for agent recruiting, volume, units, GCI, etc.
- **Royalty** – Compares Regions by the amount of royalty paid by the MCs and Region.

*On this report, Profit is calculated as:

“KW OWNER PROFIT” (from the P/L) + “Taxes - Federal Income” + “Taxes - State/Provincial Income”

Taxes are pulled from the accounts below:

Taxes - Federal Income = 6-8040 through 6-8099

Taxes - State/Provincial Income = 6-8140 through 6-9009

Sample CEO Reports

CEO Report: KWRI USA Market Center Production September 2014

September 2014

Associate Recruiting

Market Center	Month To Date				Year To Date			
	Goal	Actual	Variance	% Goal	Goal	Actual	Variance	% Goal
Market Center 1	4	7	3	175%	38	51	13	134%
Market Center 2	0	2	2	0%	26	42	16	162%
Market Center 3	6	3	-3	50%	47	43	-4	91%
Market Center 4	5	2	-3	40%	39	38	-1	97%
Market Center 5	11	18	7	164%	103	163	60	158%
Market Center 6	2	2	0	100%	18	34	16	189%
Market Center 7	13	11	-2	85%	108	90	-18	83%
Market Center 8	6	3	-3	50%	50	32	-18	64%
Market Center 9	15	20	5	133%	114	170	56	149%
Market Center 10	9	9	0	100%	82	86	4	105%
Market Center 11	8	6	-2	75%	72	74	2	103%
Market Center 12	3	2	-1	67%	27	31	4	115%
Market Center 13	22	15	-7	68%	195	168	-27	86%
Market Center 14	4	8	4	200%	32	67	35	209%
Market Center 15	5	8	3	160%	45	48	3	107%
Market Center 16	5	5	0	100%	39	42	3	108%
Market Center 17	4	5	1	125%	39	27	-12	69%
Market Center 18	15	14	-1	93%	135	128	-7	95%
Market Center 19	9	8	-1	89%	60	85	25	142%
Market Center 20	5	7	2	140%	45	46	1	102%
Market Center 21	6	5	-1	83%	61	51	-10	84%
Market Center 22	9	5	-4	56%	77	41	-36	53%
Market Center 23	4	9	5	225%	39	64	25	164%
Market Center 24	5	4	-1	80%	45	136	91	302%
Market Center 25	0	0	0	0%	12	0	-12	0%
Market Center 26	6	5	-1	83%	41	45	4	110%
Market Center 27	10	6	-4	60%	90	93	3	103%
Market Center 28	5	4	-1	80%	46	67	21	146%
Market Center 29	5	3	-2	60%	45	44	-1	98%
Market Center 30	5	2	-3	40%	49	19	-30	39%
Market Center 31	10	6	-4	60%	79	48	-31	61%
Market Center 32	9	2	-7	22%	77	40	-37	52%
Totals	225	206	-19	92%	1,975	2,113	138	107%



CEO - Regional Production
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Sample Procedures and Checklist for Training Events

(Page 1 of 4)

Name of Class:			
City:			
Dates of Class:			
Instructor's Name:			
	Date Should Be Completed	Date Completed	Who Completed
Pre-planning of the event			
Instructor Planning:			
Determine target attendees: i.e., agents, TLs, OPs, MCAs or all Leadership.			
Contact the OP and Leadership group and inform and gain commitment prior to signing contract. Also give them a break-even number.			
Schedule Instructor – Call list of available instructors for the class; call KWU if necessary for a list of instructors qualified to teach the class being scheduled. Work with instructor on available dates. Also get Education Committee approval prior to signing contract.			
Determine target attendees: i.e. agents, TL's, OP's, MCA's or all Leadership.			
Receive and signed contract from instructor.			
Schedule flight for instructor and send them itinerary—work with them on this.			
Make transportation arrangements for instructor to and from airport.			
Make reservations at hotel for instructor. Give them their confirmation numbers.			
Hotel Planning:			
Sign contract with hotel for meeting room.			
Order visual aids and sound for meeting room per instructor.			
Manuals and Printing:			
Order master manual for class from KWRI.			
Find a local printer for manual and schedule delivery to the hotel.			
Call in the final number of manuals needed to the printer.			
Marketing of Event:			
Add event to KWU.			
Add event to kwparegion.com.			
Add registration form to kwparegion.com.			
Add event to facebook.com.			
Obtain sponsor(s).			
Prepare sign-up sheet for reservations.			
Create color flier for local Market Centers.			
Create generic color flier for recruits.			

Sample Procedures and Checklist for Training Events

(Page 2 of 4)

	Date Should Be Completed	Date Completed	Who Completed	Comments
Marketing of Event				
Send initial email to TLs and owners with dates, price, instructor, and encouragement to get their agents and potential recruits signed up—as soon as hotel and instructor is scheduled. ALSO send them break even number.				
Mail Marketing Kit: To include 2 (11x17) posters, 2 magnets, 6 (8x10) fliers, CD with fliers.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 6 weeks prior to event.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 5 weeks prior to event.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 4 weeks prior to event.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 3 weeks prior to event.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 2 weeks prior to event.				
Send follow-up emails to TLs and OPs encouraging them to get their agents and potential recruits signed up. Include the current roster of attendees, flier and entire Regional calendar 1 week prior to event.				
Send emails to KW database 6 weeks prior to event.				
Send emails to KW database 5 weeks prior to event.				
Send emails to KW database 4 weeks prior to event.				
Send emails to KW database 3 weeks prior to event.				
Send emails to KW database 2 weeks prior to event.				
Send emails to KW database 1 week prior to event.				
	Hotel:			
	Address			
	City:			
	Contact:			

Sample Procedures and Checklist for Training Events

(Page 3 of 4)

	Date Completed	Who Completed
Day of the Event:		
Write check for instructor, daily teaching fee, and any expenses.		
Master check-in list and have someone man the registration table.		
Make sure room is set up properly.		
AV Equipment and Sound:		
Who is manning the registration table?		
Room set-up including room temperature		
After the Event:		
Send final check-in roster to Regional Operations Manager with any checks for the event.		
Send any invoices for the event to the Regional Operations Manager.		
ROM will finalize accounting of the event and write checks after all final invoices are received.		
Do consolidated course evaluation.		
Send consolidated course evaluation to instructor.		

Sample Procedures and Checklist for Training Events

(Page 4 of 4)

TL Name:		
Market Center:		
Item Needed	Date Received	Date Requested
Validated AVA		
Candidate Questionnaire		
Reference Checks		
In-Depth Interview		
Life Journey		
Expectations		
Compensation Package		
ALC Minutes for TL Approval		
TL Approval Date		

Oklahoma Training Event Checklist

Event: _____

Dates: _____

Instruction: _____

Location: _____

- | | |
|---|--|
| <input type="checkbox"/> Create flier. | <input type="checkbox"/> Gather the following: |
| <input type="checkbox"/> Distribute flier to Market Centers with sign-up sheet. | • Course sign-in sheet |
| <input type="checkbox"/> Send questionnaire to facilitator. | • OREC sign-in sheet |
| <input type="checkbox"/> Send confirmation to facilitator. | • Individual registration forms |
| <input type="checkbox"/> Arrange travel for trainer. | • Pens for sign-in |
| <input type="checkbox"/> Arrange accommodations for trainer. | • Post-it notes |
| <input type="checkbox"/> Reproduce course booklet. | • Paper clips |
| <input type="checkbox"/> Schedule the training room. | • Bank bag |
| <input type="checkbox"/> Set up the training room. | • Dry erase markers |
| <input type="checkbox"/> Create a participant list. | • Flip chart |
| <input type="checkbox"/> Arrange for event checks needed. | • Overhead projector |
| <input type="checkbox"/> Complete tracking sheet. | • Masking tape |
| <input type="checkbox"/> Return tracking sheet to International with check. | • Completion certificates |
| | <input type="checkbox"/> Publicize to out-of-state Market Centers. |
| | • Fliers |
| | • Map/directions |
| | • Hotel accommodation information |

Following Event:

- ☐ Send evaluations to KWU.
- ☐ Send evaluations to instructor.
- ☐ Send CE forms to OREC.
- ☐ Send attendance to Team Leaders.
- ☐ Bill the Market Centers for attendees.
- ☐ Send summary and payment to Regional bookkeeper.

Sample Instructor Arrangements for Oklahoma Regional Training Event

We're Glad You're Coming

We are excited to have you as our instructor for _____
on _____ in _____. Please take a few minutes to fill
out this questionnaire so that we can anticipate your every need while you are
training with us.

Will you be booking your travel arrangements or should we?

I will You should

If we are booking your flight:

City of departure? _____

Date and time you wish to travel _____

City of arrival _____

Date and time you wish to travel _____

Preference: Window Aisle

Do you prefer to stay in a hotel or in someone's home?

Hotel Home

If hotel, do you prefer: Nonsmoking Smoking

Bed size: Double Queen King

If home, do you have any food or pet allergies? _____

Do you prefer to be taken to dinner for your evening meal or do you prefer
that time to yourself? _____

What is your preferred beverage in the classroom? _____

Will you be bringing a laptop or should we provide one? _____

Please indicate which of the following you will need:

- | | |
|---|--------------------------------------|
| <input type="checkbox"/> Overhead Projector | <input type="checkbox"/> White Board |
| <input type="checkbox"/> Microphone | <input type="checkbox"/> Podium |
| <input type="checkbox"/> Flip Chart/Markers | <input type="checkbox"/> Other _____ |

Any other special requests: _____ +

Please fax this completed form to: _____

Sample Rewards and Recognition Program

1. Establish a Growth Bonus that is available each month for all the Team Leaders in your Region.
2. Present the bonus plan to all the owners of each of the Market Centers before implementing the plan at the Market Center level.
3. Each Market Center contributes \$250 per month for the Growth Bonus.
4. There are two prizes: first place is \$2,500 and second place is \$1,000.
5. For a Team Leader to qualify, they must net twelve agents during the month.
6. From the Team Leaders that meet the twelve net recruits requirement, determine the first and second place winners using a NET POINTS system.
 - One point is earned for an agent that is hired that produced less than one million in closed sales volume with their former company or that is new to the real estate business.
 - Two points are earned for an agent that is hired that produced one million to less than two million in closed sales volume with their former company.
 - Three points are earned for an agent that is hired that produced two million to less than six million in closed sales volume with their former company.
 - Five points are earned for an agent that is hired that produced six million or more in closed sales volume with their former company.

The KW Value Proposition

The KW Value Proposition is grouped into fifteen different elements. These are as follows:

1. Education and Training
2. Culture
3. Coaching
4. Consulting
5. Events
6. The History of Keller Williams Realty
7. The Business Model
8. Technology
9. Compensation
10. Industry Specializations
11. Profit Share and Growth Share
12. Health and Wellness Program
13. Growth
14. Accomplishments
15. Your Market Center



The KW Value Proposition

“Attracting people to Keller Williams Realty isn’t about being number one—it’s about delivering on our Value Proposition and fulfilling our mission of careers worth having, businesses worth owning, and lives worth living.” *Mark Willis, CEO, Keller Williams Realty, Inc.*

1. Education and Training

Our MVVBP states that we are a “training and consulting company” and we provide a breadth of education and training to back that statement up.

During the recruiting consultation, it may come up that a recruit has hit a ceiling of achievement. No matter what their level of production, Keller Williams Realty offers education and training to help them grow their business, move from self-employed to business owners, and build wealth for the future. This is going to be the biggest Value Proposition for a success-minded agent, whether new or a successful Mega Agent.

Keller Williams University

The training curriculum available to you from KWU has something for agents at all levels of production and is the most robust and complete training offered in real estate today.

2. Culture

The KW Mission, Vision, Values, Beliefs, and Perspective (the MVVBP) describes our philosophy for how we do business and how we treat our associates. For many agents, this is the most attractive part of KW. Yet it is not enough to simply *tell recruits* about our culture—they *should be able to see and feel it* every time they walk into your Market Center. This will only happen if you are taking every opportunity to build the culture in your office. It is stated that you cannot learn about KW culture, you must experience it.

3. Coaching

KW MAPS Coaching is all about production, coaching you to higher levels just like an Olympic coach helps athletes obtain “The Gold.”

KW MAPS Coaching is dedicated to transforming lives, designed and proven to promote personal growth and career development, and is based on the idea that "Everyone needs to be accountable to someone. No one succeeds alone." like in the Six Personal Perspectives. To support this core Keller Williams belief, KW MAPS offers a large variety of coaching programs and conditioning programs, such as BOLD, to meet the needs of all KW associates.

***“Change the way
you look at things
and the things
you look at
change.”***

BOLD Law

4. Consulting

Team Leaders consult their associates (and recruits) on issues of professional and business development, guiding them to training and education opportunities. Consulting is one of the many benefits that Keller Williams associates enjoy. Consulting enables your agents to grow their businesses to a higher level by overcoming their specific challenges through goal setting and accountability. And in addition to improving your agents’ productivity, consulting can also help your recruiting.

Most of your recruits have not experienced this benefit in their current offices. Also, consulting sessions with your agents provide great forums for you to discuss with them wealth building via recruiting. It is important that agents understand how they can generate passive income for themselves by bringing people into KW. This is a good way to get them motivated to grow their Profit Share Tree.

FURTHER STUDY

For all the latest information and any accompanying materials for Keller Williams events, simply visit mykw.kw.com and click on the **Events** tab.

5. Events

Keller Williams events, such as Family Reunion, Mega Camp, and Masterminds, exemplify many of the elements of the Keller Williams Value Proposition. When recruits attend these events, they witness firsthand how Keller Williams Realty “walks the talk” when it comes to culture, education, coaching, proven models and systems, etc. At these events, recruits also have a chance to participate in world-class training, mastermind with other successful agents, and interact with top people in our company and in the industry. And after reaping all those benefits from these events, how could they say no to joining Keller Williams Realty?



6. The History of Keller Williams Realty

Keller Williams Realty is unique. We are absolutely committed to associate success, and we are willing to work quickly to meet their needs. The company’s history conveys how those values were shaped. Being able to tell associates and recruits this history will help them identify with Keller Williams and understand why we are what we are today.

Fill Your Toolbox!



Visit www.kwconnect.com, and search for “Keller Williams” and “Our History” for a list of videos where KW leaders talk about our unique history and how we came to be a company built by agents for agents.

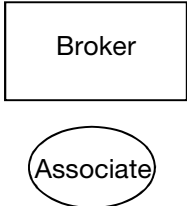
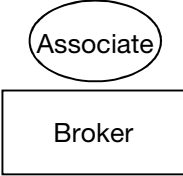
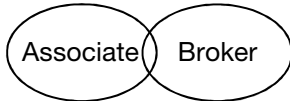
7. The Business Model

Keller Williams Realty shifted the paradigm of how real estate companies can do business by challenging the assumptions that had always supported two types of models: Dependent and Independent. As a result, a new model was created: the Interdependent Model.

To better understand these, read how Stephen Covey, author of *The 7 Habits of Highly Effective People*, describes relationships:

- **Dependent:** child who is dependent upon Mom and Dad; “Mom and Dad, I love you and need you!”
- **Independent:** teenager who rejects Mom and Dad, because they have not kept up and are not ready to let go; “Mom and Dad, I don’t need you!”
- **Interdependent:** mature adult who does not need Mom and Dad, yet realizes that life is better with them around; “I love you, and although I don’t need you, my life is better with you in it!”

Since real estate is a relationship business, we can use Covey’s model as a way of looking at how real estate companies form relationships with their associates. Below is a diagram you can use, if needed, when explaining this concept.

1930–40s Dependent Model	1970–80s Independent Model	2000s Interdependent Model
 <ul style="list-style-type: none">▪ No risk▪ Fifty-fifty commission split	 <ul style="list-style-type: none">▪ High risk▪ 100 percent commission▪ No support▪ No service▪ \$1,500–\$2,000 fees due every month	 <ul style="list-style-type: none">▪ Low margin▪ High volume▪ Associate and broker are partners in the business

8. Technology

eEdge – Created by a vote of Keller Williams associates, eEdge is the real estate industry's first and only complete lead-to-close agent business solution—including a full lead management system, contact management system, customizable marketing library, and a paperless transaction workflow. eEdge also offers 8 x 8 and 33 Touch contact plans for recruiting.

Exclusively for KW associates, eEdge saves time, money, and effort by reducing redundancies in the workday and allowing associates to do what they do best—list and sell homes and shine with their clients.

- **eAgentC** – Before eEdge, Keller Williams associates voted to create an agent-focused technology group called eAgentC—The Electronic Agent Consortium. Its mission is to protect and develop our associates' fiduciary position in the electronic world. Some of the tools available through eAgentC: KW web mail and email, KW agent websites, Market Center websites, miscellaneous reports.
- **MyKW** – Simply put, MyKW is the one stop for everything KW associates need to succeed, from free Keller Williams University course downloads to on-demand KWConnect training videos to KW MAPS Coaching resources. If you want to learn and hone your skills for any role with Keller Williams, go to MyKW.

Fill Your Toolbox!



Visit mykw.kw.com and click on the **Technology** tab. The Technology page is your direct access to KW Technology tools such as email, agent websites, KWLS, Greensheet, KW Blog, and many technical tips to help you manage your online business.

9. Compensation

An associate's compensation is their commission split. In traditional real estate companies, splits are high for the brokerage. In 100 percent companies, they work under the guise of giving agents more or all of their commission, while charging large “desk fees.” This last point is lost on many agents, so you will need to help them understand it.

Commission compensation at Keller Williams Realty is low-risk, high-keep. KW is able to accomplish this through a cap system. Two payments are capped: the amount the agent pays as a franchise royalty—which is capped at \$3,000—and the amount the agent pays their local office as determined by local economic conditions.

The benefits of a capped system include the fact that agents know how much they will be paying, the amount they are paying is limited, and top producers are not “penalized.” This means their income potential is unlimited!

In reality, KW is a 100 percent-*plus* company. In some countries, such as the United States and Canada, the financial rewards are offered through our Profit Share program. Through Profit Share, we offer our agents the opportunity to earn more than what they pay toward their cap.

Elsewhere in the world, Keller Williams Realty offers a Growth Share program in which master franchise owners and Keller Williams Realty reward associates who help the company grow.

These programs make up the Keller Williams Wealth-Building Platform. Something agents must consider is that it's not the split that counts; it's what they get to keep!

10. Industry Specializations

KW Commercial – The commercial real estate arm of Keller Williams Realty offers commercial agents a capped commission structure, a Commercial Leadership Council, custom signs and other branding, an international commercial referral network, and more.

KW Luxury Homes International – The luxury homes branch of Keller Williams Realty offers luxury agents signs and other custom branding material, a luxury homes referral network, an annual luxury homes networking retreat, and more. If you are not already a member, as Team Leader, you can choose to enroll your Market Center in order to build the brand in your local market.

Farm and Ranch – The farm and ranch branch of Keller Williams Realty offers farm and ranch agents custom logos, Mastermind events, networking opportunities/forums, breakout sessions at Family Reunion, and more.

Fill Your Toolbox!



Links and tools for the industry specializations proposition:

www.kwcommercial.com: KW Commercial offers training across the United States and Canada on a regular basis.

Give your commercial agent recruit a copy of *SHIFT Commercial*. Assign a section for him or her to read, then make a follow-up appointment to discuss.

www.kwluxuryhomes.com: For more information about the luxury homes division of Keller Williams Realty.

Keller Williams Farm and Ranch info can be found on the MyKW site, www.mykw.kw.com, under the Resources tab.

11. Profit Share and Growth Share

Keller Williams is interested in their associates increasing their wealth with residual income.

The two systems Keller Williams Realty uses to reward associates who help the company grow are:

1. Profit Share
2. Growth Share

Profit Share

Profit Share is how KW rewards associates for referring other agents to the company, and is just one of the ways Keller Williams Realty treats associates as stakeholders. Giving associates a financial stake in the company creates an environment that encourages them to play an active part in bringing other agents into the company.

Make sure the recruit understands the overall *concept* of Profit Share. Be sure you proactively address common misconceptions about Profit Share (i.e., that an agent has to wait three years before they receive Profit Share. The three-year rule is actually a vesting rule—an agent will enjoy Profit Share for a lifetime once he or she has been with the company for three years. One could actually start receiving Profit Share the month after they join the company).

Script: Explaining Profit Share

Are you familiar with our Profit Share system? agent name in the office made an additional \$_____ (*yearly amount*) with this one system alone. It is residual income that will go on forever and can even be willed to someone. It's a gift that keeps on giving. It helps us leave a legacy.

“Say *PROFIT* like you love it!”

*Mo Anderson
Vice Chairman
of the Board,
Keller Williams Realty
Austin, Texas*

Growth Share

Growth Share is also a program for rewarding associates who help the company grow by creating an ongoing revenue stream. Some countries use this program instead of the Profit Share Program. Growth Share is a program in which master franchise owners and Keller Williams Realty reward associates who help the company grow.

Here's how Growth Share works: When an agent completes a transaction, the agent earns a commission. Part of that commission goes to the Market Center and part goes to the franchisor as a royalty. The franchisor then returns a portion of that royalty to agents as Growth Share, in thanks and recognition for their contribution in referring agents to Keller Williams Realty. The more agents a particular individual has referred, the bigger their potential Growth Share payment.

Script: Explaining Growth Share

Are you familiar with our Growth Share program? *Agent name in the office* made an additional \$_____ (*yearly amount*) with this one system alone. It is an ongoing, additional income stream for agents who help the company grow.

Fill Your Toolbox!



Tools and Links for the Profit Share and Growth Share Propositions

www.kwconnect.com: When you type in the search words “Profit Share” or “Growth Share,” you will get information on these KW wealth-building opportunities.

Consider sharing stories about agents in your office who are directly benefiting from Profit Share or Growth Share.

Invite recruits to your monthly Grow Your Profit Share or Growth Share class in your Market Center.

12. Health and Wellness Program

Because Keller Williams Realty realizes a life worth living has to be a healthy one, the company now offers an entire Health and Wellness Program for our associates.

The first and perhaps most critical piece of this program is the Keller Williams Health Providers Program, which includes multiple health insurance vendors and plans to meet the health coverage needs of our associates.

Fill Your Toolbox!



Additional information about this program can be found at mykw.kw.com under the Resources tab.

13. Growth

The growth of KW is astonishing to see. This is also a powerful message to convey to recruits because implicit in the growth numbers for the company is the question, “If all of these agents have joined KW, what is it that you’re missing out on?”

Fill Your Toolbox!



Tools and Links for the Growth Value Proposition Element

There are a variety of reports on mykw.kw.com. Meet with your MCA to decide which reports would best demonstrate KW’s growth on local, national, and international levels.

Your Dashboard Report also contains some great numbers you can use when discussing this Value Proposition with a recruit.

Utilize your local MLS numbers to demonstrate how your office compares in growth to other real estate offices in your marketplace (as demonstrated in the “Language of Real Estate” video we watched earlier).

KW MAPS Coaching has a group coaching program to help benefit you whether they coach you on your health, building profit share, KW Commercial, or KW Luxury Homes International. Check out what they offer!

14. Accomplishments

Keller Williams Realty has been honored to be the recipient of prestigious awards and recognition both inside and outside the real estate industry. Be sure to proudly share this information with your potential recruits when applicable.

Recent Awards:

- Third year in a row, *Entrepreneur* magazine ranked Keller Williams Realty the number one real estate franchise on the Franchise 500 list.
- Ranked in America's top ten national workplaces by Workplace Dynamics.
- No. 1 on the annual REAL *Trends* 500 Report where KW offices represented 23 percent of the top 500 ranked by transactions and 24 percent of the top 500 ranked by volume—more than any other real estate franchise.
- **Inman News** – Cofounder and Chairman of the Board Gary Keller named one of the 100 Most Influential Leaders in Real Estate.
- **Training Magazine** – Training Top 125, 2010 and 2011.
- **KW MAPS Coaching** – has earned multiple accolades, including being awarded a Stevie Award for Sales Training and Coaching Program of the year, and was the first real estate company to be nominated for the PRISM Award for its excellence in coaching.
- **KW is frequently honored for our exciting accomplishments. To see what's going on with our numerous awards, visit mykw.kw.com and look at "Press Releases" under the Marketing tab.**

Recognition:

Business Case Study – Both the Stanford Graduate School of Business and the Yale School of Management have added a Keller Williams case study—which describes the economic and cultural models that have led to the success of Keller Williams Realty—to their core MBA curriculums.

The Millionaire Book Series – More than 1 million copies of this series—*The Millionaire Real Estate Agent*, *The Millionaire Real Estate Investor*, *SHIFT*, *SHIFT Commercial*, *FLIP*, and *HOLD*—have been sold.

15. Your Market Center

Be prepared to tell the story of your Market Center. Just as recruits are attracted to the Value Proposition of the KW history, they will be interested in knowing how your Market Center is different and better than other options in your local market. You can explain how your Market Center came to be, how the Market Center fills a void, and how several local, well-respected top agents helped shape the Market Center.

Discuss your Market Center's Value Proposition from a perspective that addresses the recruit's question, "What's in it for me?" because recruits want this answered before they consider coming on board. Be clear on what the elements of your Value Proposition are.

Notes

KW Cares

Purpose

Keller Williams Realty is a service business where respect and support for one another is fundamental to every action undertaken. Keller Williams Realty Cares (KW Cares) was established as a 501(c)(3) public charity to show compassion for Keller Williams associates during times of extraordinary need. KW Cares is an important part of the Keller Williams culture.

Through a variety of activities, individuals and Market Centers across the country work together to provide assistance for KW family members when an extreme emergency or catastrophic circumstance results in a serious financial hardship that a person or family is unable to handle without outside help.

Each Market Center's KW Culture Committee performs the following functions as a steward of the Market Center's culture:

- It oversees Market Center fundraising efforts for the annual goal of \$3,000 in donations to benefit KW Cares, the 501(c)(3) public charity.
- It assists eligible KW associates in need with the KW Cares grant application process.
- It oversees all of the Market Center's non-KW Cares-related charitable activities, including fundraising for individuals in need within the Market Center or the local community, as well as fundraising efforts for charities other than KW Cares by:
 - a. Establishing and maintaining a Market Center's local emergency fund in order to provide monetary gifts to individuals in need within the Market Center or the local community.

Note: Unless a Market Center has established its own separate 501(c)(3) entity for the local emergency fund, donations to this fund are not tax deductible and donors should not receive receipts for tax purposes. KW Cares cannot issue tax receipts for donations to a local emergency fund.

Note: These local emergency funds must not be used for Market Center expenses. Funds collected should be segregated in separate liability accounts.

- b. Providing care, comfort, and nonmonetary support to those in need within the Market Center or the local community in the spirit of "family helping family."

- c. Conducting fundraising efforts for charities other than KW Cares. Donations may be tax deductible as allowable by law and, if appropriate, tax receipts may be issued by the charity for which the effort is being conducted.

Additional information can be found on the KW Cares website:
www.kwcares.org.

Donations to KW Cares

How Individuals Can Donate

By Check:

All checks should be made payable to KW Cares and sent to:

KW Cares
1221 South Mopac Expressway
Suite 400
Austin, TX 78746

By Credit Card:

Donations may be made by credit card through the KW Cares website, www.kwcares.org. Click the “Donate Now” button to be taken to a secure website for online transactions. Receipts will be issued monthly via email on and should be retained for tax purposes.

Greensheet Contributions

Associates can assign either a flat amount or percentage of the proceeds from every closing as a donation for KW Cares. Each Market Center should strive to have 100 percent of its associates contributing through Greensheet donations. The Greensheet Authorization Form should be kept in the associate’s file. The form itself can be found in this chapter and is available for download at www.kwcares.org/downloads. In states where checks are issued by the title company, donation checks should always be routed to KW Cares through the MCA, who ensures that the agent’s name and Market Center number are on the memo line at the bottom of the check.

Submitting Multiple Donations

It is very important that donor information is sent with each check. When a market center sends a single check representing multiple donations, it is imperative to include a spreadsheet of donor names, email addresses, and individual donation amounts so KW Cares staff can issue accurate tax receipts as allowable by law.

Receipts for Tax Purposes

Receipts are emailed from KW Cares monthly to the donor's email address on file and should be printed and retained for tax purposes. Donors should inform KW Cares when their email address changes.

Processing KW Cares Deductions through WinMORE

- There is a dedicated KW Cares deduction line on the Greensheet.
- KW Cares donations from the Greensheet will be included in the “pay to KW Amount” and be included in transmittal.

Associate Entry - Brian Schneider

File Edit Other Help

Read Save Clear

Associate Commission Profit Share History

Commission and Splits

Associate Royalty Cap \$: 500.00 Commission Split %: 70

Base Commission Split %: 70 Company \$ CAP: 18,000.00

Royalty Split %: 100 Royalty Base CAP: 60,000.00

Commission EIN: 32-1549876 Company Name: Test Company LLC

Spouse MORE ID: Spouse Name:

KW Cares

1.00%

Examples:
\$10.00
1.00%

Deductions

	Type	Deduction	Account #	Amount
1				
2				
3				

Designations

Designations

Royalty Exception and Explanation

DA Entry - Associate Detail

Teams and Groups

Assoc ID: 5406 Producer, Paul

Team/Group:

Type: S

Class: P

Agency: B

Unit: .500

Gross: 1,750.00

Outside: .00

Bonus: .00

Concession: .00

Gross Commission Income: 1,750.00

Tax:

Check Amount: 1,750.00

Associate Split %: 70

Royalty Split %: 100

Associate Commission: 1,225.00

E O Insurance: .00

Associate Royalty: 105.00

Inside Paid: .00

Concession Adjust: .00

Net Commission: 1,120.00

KW Cares: .00

KW Family Fund: .00

BOLD Scholarship: .00

Deductions: .00

Associate Check: 1,120.00

Company Commission: 525.00

Pay to KW: 630.00

Written Volume: 70,000.00

Closed Volume: 70,000.00

Adjusted Volume: 58,333.33

OK Cancel

Display CAP

PROFIT SHARE CALCULATIONS FOR MC#9999		August, 2014	DATE:08/30/2014
		CO. COMMISSION	141,242.75
		- LOSS FORWARD	.00
		- SET COSTS	99,874.98
		+ AGT. RLTY.	24,203.67

		= INC. BEFORE KW	65,571.44
		LESS ROYALTY	-24,203.66
			=====
		= PS PROFIT	41,367.78

		.25 of 2,990.00	747.50
		.35 of 8,250.00	2,887.50
		.50 of 30,127.78	15,063.89
		AGT. PROF. SHARE	18,698.89
		+ BASE ROYALTY	.00
		.060 x 30000.00	1,800.00
		.060 x 373394.30	22,403.66
		+ F/R ADJUST.	.00
			=====
		= TOTAL TO KW	42,902.55
		+ MARKETING DEV	83.33
		+ TECH FEE	79.00
		+ NEW AGENTS	350.00
		+ CONSORTIUM FEE	2,850.00
		+ COMMERCIAL FEE	510.00
		+ eEDGE FEE	4,275.00
		+ KW Cares	226.00
		+ KW Connect	500.00
		+ KW Family Fund	89.00
		+ BOLD Amount	48.00
			=====
		REMIT TO KW	51,912.88
			=====
NET INCOME	65,571.44		
- TOTAL TO KW	42,902.55		
	=====		
MC PROFIT/LOSS	22,668.89		
First Time Recruiting Appts: 17			

Benefit–Accuracy and Time Savings

- Submitting donations in this manner ensures accuracy, and is much more efficient and cost-effective for market centers than submitting them by mail each month.*
- WinMORE deposit will place the donations in the liability account for KW Cares.
- The Profit Share Calculation Report will show total KW Cares DA donations for the month.
- The MCA will invoice KW Cares as a line item on the monthly invoice.
- KWRI will draft these deductions with the rest of the Market Center fees and remit the donations to KW Cares.

*Note: For greater detail, please reference the WinMORE manual.

Proceeds from Market Center Fundraising Events for KW Cares

- Proceeds from fundraising events are not submitted with transmittal.
- Proceeds will be processed by KW Cares upon receipt of the event reconciliation workbook and the proceed check(s).

Sample Greensheet Authorization Form



Market Center Name _____ **Number** _____

Authorization for
KW Cares Greensheet Donations

I Take it to Heart! I authorize a donation for KW Cares, in the amount or percentage indicated below, be deducted from each of my closings. I understand that either the market center or the title company will ensure that my donations are received by KW Cares, 1221 South Mopac Expressway, Suite 400, Austin, TX 78746, in a timely manner, and that KW Cares will issue a receipt for each donation.

\$ _____

% _____

Print Donor Name

Donor Signature

Date

Print Team Leader Name

Fundraising

Fundraising for KW Cares

If you plan to have an event to raise funds for KW Cares using the name and logo in the title of the event, or in the promotional materials, and have KW Cares issue receipts for tax purposes, you **must** complete and submit the Fundraiser Agreement Form prior to making any financial or legal commitments. Events conducted in the name of KW Cares without its knowledge and permission could jeopardize the tax-exempt status of the charity. (A Fundraiser Agreement Form can be found in this chapter and is available to download from www.kwcares.org/downloads).

Required Forms

Fundraiser Agreement Form

If your event is approved, KW Cares will return the signed agreement form for your records. Upon approval of your printed and electronic marketing materials, an electronic copy of the KW Cares logo will be provided for this **onetime use**. Once your fundraiser is approved, you will be acting as an agent of KW Cares and must follow all KW Cares fundraising procedures and use only KW Cares reporting forms.

Receipt for Donated Goods

Your donors may want a Receipt for Donated Goods, which is given to people who contribute tangible items (usually for auctions) to benefit KW Cares. Receipts will be generated and sent to donors **by KW Cares** once the reconciliation of the event has been submitted and finalized. **Only KW Cares** may distribute receipts for monetary or in-kind donations.

Event Reconciliation

When organizing an event, the event Reconciliation Spreadsheets, available for download at www.kwcares.org/downloads, must be used to keep track of donation details. The spreadsheets must be fully completed, balanced, and submitted with event expense documentation and proceeds within thirty days of the event. Please use only these forms and do not alter or generate your own versions. (Samples of these forms can be found in this chapter.)

Note: All forms can be downloaded from the KW Cares website: www.kwcares.org.

Because fundraising events differ in nature and in how they are handled for tax purposes, we recommend that you work with KW Cares staff to correctly reconcile your event.

Disclosure

For ticketed events and other activities where there is an exchange of goods or services for the price of participating in the event, the receipt will reflect the net donation to KW Cares. For example: A \$100 ticket is purchased for a banquet to raise money for KW Cares, but the actual value of the meal is \$50. The amount of the donor's actual donation is \$50 and this must be disclosed to the donor on the ticket and in any printed or electronic materials so he/she will know the exact amount of his/her tax-deductible donation. Please contact KW Cares with any questions about disclosure.

Market Centers are responsible for collecting and paying sales tax in their state when products are sold at a fundraising event. Check with your state taxing authority to register to collect and pay state sales tax.

Fundraising for Individuals or Other Charities

If your event is unrelated to KW Cares, i.e., for an individual or another charity and not KW Cares, use of the KW Cares name or logo is inappropriate. Donations for an individual in need are not tax deductible. Funds raised for another nonprofit organization may be tax deductible. Donations made to nonprofits other than KW Cares will be acknowledged by those charities. It is good practice to communicate with the charity in advance to determine how they wish to receive donor information.

IMPORTANT:

KW Cares will not endorse an event used to promote an agent's or Market Center's business, to secure listings, to recruit associates, or to promote a political agenda or candidate for office. KW Cares fundraisers should be limited to raising money exclusively for KW Cares. The events should be charitable events, not commercial events. **All** monies raised must be sent to KW Cares. If a Market Center wants to cover its costs from the proceeds, it must advise donors through a disclosure statement. (For example: A \$100 ticket is sold for a banquet to raise money for KW Cares, but the actual value and cost of the meal is \$50. The amount of the donor's actual donation is \$50 and this must be disclosed to the donor on the ticket and in any printed or electronic materials so he/she will know the exact amount of their tax-deductible donation.)



KW Cares Fundraiser Agreement

Fax to: 435-514-2229 or email to kwcares@kw.com

Contact Information

Contact Name:	Title:
MC (or Region) Number and Name:	
Address:	
City, State, Zip:	
Email:	
Phone:	Fax:

Event Information

Type of Fundraiser:	Date:
List all activities planned:*	
Will you solicit sponsorships?	Location:
Estimated Attendance:	Cost per Individual:
Estimated Gross Proceeds:	
Estimated Direct Costs:	
Estimated Net Proceeds:	

The _____ Market Center (or Region), hereby requests the use of the Keller Williams Realty Cares (KW Cares) name for an independent, third-party-sponsored fundraising event with the understanding that **100 percent of the proceeds will be donated to KW Cares**. KW Cares is an organization described in Section 501(c)(3) of the Internal Revenue Code and is located in Austin, Texas. KW Cares grants Market Center (or Region) the right to use the KW Cares name for an independent, third-party-sponsored fundraising event with the understanding that **100 percent** of the proceeds will be donated to KW Cares.

As this is an independent fundraiser, Market Center (or Region) agrees and understands that the planning and implementation of the event are the sole responsibility of Market Center (or Region). Market Center (or Region) will be liable to pay any expenses incurred in excess of gross proceeds from the event.

Gaming Activities: KW Cares does not permit fundraising activities that include gaming for profit, goods or services, including but not limited to poker, casino nights, raffles, bingo, etc.

Liability Insurance: KW Cares shall be held harmless from any liability in connection with the fundraising event. If the Market Center's (or Region's) general liability insurance policy does not cover this event, liability insurance coverage must be purchased and proof of insurance submitted to KW Cares.

Disclosure: Market Center (or Region) agrees that it will disclose to contributors and sponsors of the event that KW Cares is an organization described in Section 501(c)(3) of the Internal Revenue Code and that contributions, **less the value of any benefits received in exchange for such contributions**, are tax deductible to the extent allowed by the Internal Revenue Service (IRS) Regulations.

Disclosure Statement: Market Center (or Region) agrees to submit for approval to KW Cares a disclosure statement specific to the contributions (including sponsorships) that will be made as a result of this event. The approved

Fundraiser Agreement Form—Page 2

disclosure statement must appear on all promotional or other materials reflecting the cost of participating in the event (see examples** on p. 2). Failure to do so subjects KW Cares to fines levied by the IRS. Market Center (or Region) agrees that the approved disclosure statement shall be provided to all event contributors.

Management of Event Funds and Reconciliation: Market Center (or Region) understands that for KW Cares to issue receipts, all checks for sponsorships, fees, tickets and donations must be made payable to KW Cares, and that checks to KW Cares must not be deposited in Market Center (or Region) accounts. Gross receipts must be received by KW Cares. In the case of major fundraisers such as golf tournaments or galas, etc., KW Cares, in its sole discretion, will work with the Market Center (or Region) to pay deposits and expenses. Minor expenses are to be covered by the Market Center (or Region) and will be reimbursed upon receipt of a completed **KW Cares Event Reconciliation Form**, which can be downloaded from the KW Cares Website www.kwcares.org. Receipts for all expenses must be submitted to KW Cares with the reconciliation. Market Center (or Region) agrees that the complete reconciliation of the event will be submitted to KW Cares within 30 days of the event. Market Center (or Region) will be liable to pay any expenses incurred in excess of gross proceeds from the event.

Receipts: Market Center (or Region) understands, acknowledges and agrees that receipts for tax deductible donations as allowable by law are to be issued **only by KW Cares** in Austin. Market Centers (or Regions) may not issue any receipts.

Marketing: Market Center (or Region) agrees that all event marketing materials (including tickets) using the KW Cares name and/or logo will be submitted to and authorized by KW Cares prior to any use of the name/logo. The logo's appearance may not be altered.

Promotion: Market Center (or Region) agrees that this event will not be used to promote an agent's, Market Center's (or Region's) business, to secure listings, to recruit associates or to promote a political agenda or candidate for office. Market Center (or Region) agrees the event will be limited exclusively to raising money for KW Cares and will be promoted as a charitable event, and not a commercial one. Market Center (or Region) agrees that KW Cares will be promoted as a charitable organization and not as a benefit or potential benefit of working for a Keller Williams organization or as an agent.

*Please include all aspects of the event. Examples: (#1) the golf tournament will be followed by a dinner. The cost of the dinner is an additional \$35 (or included). (#2) Live and silent auctions will be conducted at the gala. Please provide details on a separate sheet if needed.

** Example of a disclosure statement: *Please note that only the portion of your contribution that exceeds the value of any benefits received, or items purchased, is tax deductible.*

Provide the **Disclosure Statement** for your event: _____

I understand and agree to these terms and accept responsibility for the conduct of this event and the timely reconciliation (within 30 days) of this fundraiser.

Event Chair Signature Date

I authorize this fundraiser on behalf of MC (or Region) and agree to the terms herein.

TL/OP/(RD) Signature Date

I authorize this fundraiser on behalf of KW Cares.

KW Cares Signature Date

Please contact KW Cares at 512-306-6727 or kwcares@kw.com if you have any questions.

KW Cares Grants

About Grants

KW Cares supports Keller Williams associates and their families with hardship as a result of a sudden and significant emergency. Hardship is defined as a difficult circumstance that a person or family cannot handle without outside help.

KW Cares grants are not intended to provide for all of the expenses and losses that are incurred as a result of a sudden emergency situation, but rather to provide a degree of assistance, a helping hand, in order to work through an unexpected and difficult period.

Grants are nontaxable gifts for which KW associates may apply. Agents in referral status are not eligible for KW Cares grants. Vested/retired agents who have at least 6 years as an active agent and who have not left Keller Williams to join or start another business, are eligible for grants.

KW Cares is not able to give grants for:

- Residential or nonresidential substance abuse facilities or treatment
- Unconventional treatment for cancer or other serious illnesses
- Legal issues such as divorces, child custody issues, adoptions, etc.
- Debt relief, compensation for lost wages, or to bridge gaps in income unrelated to a specific emergency situation

Grant requests are made through a written letter accompanied by the KW Cares Grant Application and all required documentation. The grant application is available for download at www.kwcares.org/downloads. Applicants should allow thirty days following KW Cares receipt of all required documentation for a response. KW Cares board approval is required for grant awards.

The KW Cares board of directors expects that the applicant will have received adequate financial support from his/her Market Center community of agents, leadership and staff at the time of application. If the Market Center has not contributed, the Market Center and/or Region will be asked for an explanation.

A KW Cares grant does not endeavor to resolve situations more appropriately funded or resolved by the government, social agencies, legal entities, or other institutions.

Please note that although an applicant may appear to meet all grant criteria, grant approvals are dependent upon many factors that the board must carefully consider, and therefore not every application will be approved.

KW Cares Education Grant Application

In honor of one of KW Cares founders, Martha Squires, KW Cares provides opportunities for education grants. The purpose of an education grant is to provide a measure of financial assistance to a family member of a Keller Williams associate who is pursuing a higher education degree.

As with all other KW Cares grants, education grants provide assistance to students who have been challenged with financial hardship due to a major unexpected emergency, personally or within their immediate family. The Education Grant Application can be downloaded from the KW Cares website: www.kwcares.org/downloads.

The Grant Application

A KW Cares grant application must be documented with the following.

- Cover letter summarizing (1) the medical/other emergency situation, (2) financial situation, (3) explaining what the Market Center and others have done to assist the applicant and (4) what they will continue to do to support the applicant after the grant has been awarded.
- If the grant request is related to a medical condition, the completed and signed Physician's Statement must be submitted with the grant application.
- A summary of claims from the medical insurer for all claims related to the situation for which assistance is being sought, indicating the total amount of the patient's financial responsibility, is required to document out of pocket medical expense. Applicants who do not have medical insurance coverage need to submit copies of all bills.
- All of the information regarding assets, liabilities, income, and monthly living expenses as requested on the grant application, with a copy of the most recent statement (the entire statement) for each.
- A copy of the two most recent Federal Income Tax Returns in **their entirety** with 1099s and/or W2s attached.
- KW Cares reserves the right to request additional relevant information.

The KW Cares Grant Application can be downloaded from the KW Cares website www.kwcares.org/downloads.

The Grant Application Process

Step 1: Needs Assessment: Does it meet the criteria for a KW Cares grant?

Potential applicants should contact their Team Leader, KW Cares Representative, or KW Cares to discuss whether the need meets the criteria for a KW Cares grant.

Criteria for a Keller Williams Realty Cares Grant

- Addresses a need of a Keller Williams family member, including associates and staff, as well as eligible family members, due to a hardship as a result of emergencies and unforeseen and/or unpredictable circumstances over which the applicant has no control and cannot handle without assistance. Please contact KW Cares for information regarding who is eligible as an immediate family member.
- Supports a need too large for one Market Center to undertake alone.
- Onetime grant except as special circumstances may dictate.
- Does not endeavor to resolve situations more appropriately funded by government agencies, social institutions, or legal entities.
- Is consistent with the value system of Keller Williams Realty.

Step 2: Market Center Approval

If the request meets the above criteria, a completed grant application must be reviewed and signed by either the Team Leader or the Operating Principal. The signature certifies the validity of the need and the support of the Market Center.

Step 3: Regional Director Approval

If the request meets the above criteria, the complete grant application packet should be forwarded to the Regional Director who should review the application and supporting documentation to be able to certify the validity of the need, Regional approval and that adequate Market Center support has been provided.

Step 4: Submitting an Application

Once the Regional Director reviews and validates the request by signing the application, that application and the supporting documents need to be faxed to KW Cares at 1-435-514-2229 or emailed to kwcares@kw.com. The KW Cares board of directors will consider the request. Please allow thirty days following KW Cares receipt of all required documentation for a response.

Step 5: Follow-up

Once a grant is awarded, the Team Leader should follow up with KW Cares from time to time to provide updates, possibly including photographs, newspaper clippings, etc., so the grantee's story can be documented. KW Cares will share a grantee's story only with the permission of the grantee.

For questions, please contact kwcares@kw.com.

KW Cares

Contact Information

Phone: 1-512-306-6727

Fax: 1-435-514-2229

Crisis Line (emergency only) 1-866-591-2737

Email: kwcares@kw.com

Website: www.kwcares.org



KW Technology & Marketing Systems

Systems Behind You at Every Step

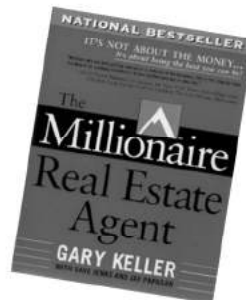
Many real estate professionals dream of building a million-dollar business. However, to hit that million-dollar mark in annual revenue, you need to have a solid sales system and abide by some basic good practices. The Millionaire Real Estate Agent (MREA) by Gary Keller offers well-defined and easy-to-grasp models and systems to achieve that goal. Gary Keller believes there is a science to building a highly successful business, and it works for agents and brokers alike.

Our marketing and technology systems allow you to put these models into action while focusing on the activities that matter most. We provide tools to help agents at every step of the way in running their businesses:

1. Attracting and capturing **leads**
2. Converting leads to **appointments**
3. **Winning the client's business** at appointments
4. Providing superior **customer service** to every client
5. Ensuring a bulletproof, efficient **closing** process for every transaction
6. Building lifelong relationships with clients that lead **to repeat business and referrals**

And, because running and growing a Market Center involves many of the same activities – you're just working with agents instead of consumers – our marketing and technology systems have broker applications as well.

As the only major real estate franchise company in North America to experience positive growth in recent years—among the most challenging in the industry—our time-tested models and systems establish a framework for profitability in any market. This is why we continue to far outpace the growth trajectory of any competitor.



Technology to Drive Your Business

Technology is playing a bigger and bigger role in agent marketing and productivity. And, we recognize that in order to succeed in today's global real estate market, you have to stay on the cutting edge of marketing and technology.

Keller Williams' technology suite is completely focused on driving your business and saving you time and money. And, it's available exclusively to Keller Williams associates.



The lead generation network falls under the umbrella of **eAgentC**. This stands for Electronic Agent Consortium, which is an agent-focused and funded technology group, established in 1999. Today, our lead generation network is bigger than ever! It includes:

- National-level websites that help consumers find a professional real estate associate in as few clicks as possible.
- Market Center and agent websites that contain numerous lead capture opportunities, and can be tailored to match the brands of brokers and agents seeking a custom web presence.

Keller Williams agents and brokers are also armed with **eEdge**. A lot of people think that KW Technology is eEdge, when in fact, eEdge is just one piece of a much bigger picture, as shown here. Inspired and directed by our associates, and named by Inman News as the Most Innovative Web Service in the real estate industry in 2011, it is the repository for all of the leads that come in from the lead generation network. eEdge is the real estate industry's first and only COMPLETE lead conversion to close system. It includes lead management and routing capabilities, full contact management, a professional marketing library, and a true paperless transaction system—all in one integrated, efficiency-increasing package. All based on the MREA models and systems. Our technology is designed to enhance, not distract you from, your business activities.

Finally, all Keller Williams associates are equipped with a number of cutting-edge productivity tools, and the critical support and training that enables them to move into production immediately and stay ahead of the competition. We are proud to say that **Training Magazine** named Keller Williams Realty the #2 training organization in the world and #1 in the real estate industry.

Marketing to Win Business

We have found that the difference between success and failure in real estate is the ability to stay connected to a complex matrix of hundreds of people and their information.

To turn your business into a productivity machine, it is not enough to simply have a large database of contacts. You must have a plan for when and how you are going to contact those people and a tool with which to execute the plan. Your plan should be systematic, and your tool efficient, so you are contacting everyone at the appropriate time, with the appropriate message, in the right medium.

We give you the power to grow your Keller Williams Realty office and your associates' careers using our world-class marketing systems with automated campaigns, design templates, call scripts, video touches, and proven presentations. From attracting new agents to your Market Center to helping them grow their business, Keller Williams Realty helps to build a customized marketing approach in every market.

These unique, automated marketing campaigns are all based on the proven models from *The Millionaire Real Estate Agent*. They are quick and easy to launch, allowing agents to follow up with potential and past clients in a truly automated way.



Most importantly, they work! The proof is in the numbers! We monitored the productivity of agents who used eEdge to run touch campaigns to their contact database. From the time eEdge was launched in 2011 to January 2013, we saw an average increase of 90 percent in gross commission income!

As of January 2013, eEdge users had ...

	LAUNCHED	70,350	automated, customizable marketing campaigns
	REACHED	5,412,280	consumers
	EXPERIENCED	90%	increase in gross commission income

Your Brand Matters Most

When it comes to marketing and technology, you'll have the power of the Keller Williams name as an asset to your business. At the same time, we recognize the need you'll have to customize and localize your marketing approach.

Keller Williams agents are independent contractors who can market themselves any way they want. We know that the vast majority of consumers choose agents on individual characteristics. National brand affiliation doesn't matter to 96 percent of them. So, we think you should spend your marketing dollars on promoting YOUR individual brand.



We aim to make our agents the premier resource for consumers looking for real estate online in their market because they are the expert. While other companies have a marketing department dedicated to promoting their

national brand, Keller Williams has a marketing department dedicated to creating marketing pieces that help agents build their own brand.

Put the Models Into Action

Gary Keller has also identified the pillars of any successful real estate business: **Leads**, **Listings**, and **Leverage**. The “Three Ls” are the key activities that will yield the greatest return for your business, and therefore, these should be first and foremost in your mind.



- **Leads:** Like it or not, you’re in the lead generation business. Without leads, you won’t be in business for long. No leads means no sales.
- **Listings:** After leads, getting listings should be the primary focus. Marketing a listing not only gets the listing sold, it delivers buyer leads and other referrals to you.
- **Leverage:** When you focus effectively on getting leads and listings, you’ll eventually have more business than you can handle. You’ll then have the opportunity to leverage help in the form of people and tools so you can offload your administrative tasks—the ones that don’t bring you revenue.

In the center of this triangle is your **contact database**. That’s because we believe that “your business is your database.” The health of your business depends on how well and how often you stay in touch with your contact database and feed your database with new leads. Your database is at the center of everything you do and you need to keep it alive by engaging with it every day.

The marketing and technology systems we provide you at Keller Williams Realty are specifically designed so that you can focus on Leads, Listings, and

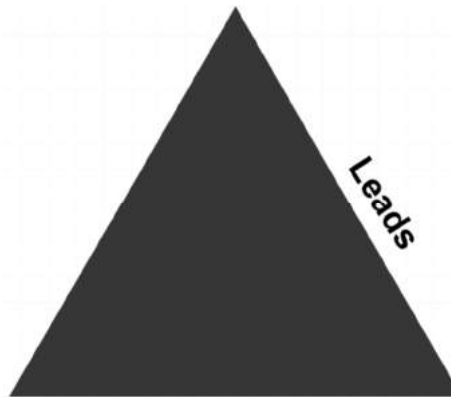
Leverage. We also provide you a powerful contact management system so you can stay on top of those activities and your database without spending excessive time or money. That's the law of leverage in action.

Many of our agents who came from other companies have stated they are more productive now because of the models, systems, tools and training they have received at Keller Williams—again, because everything we offer our associates is designed to make it easy to put the MREA models into action.

We'll take a closer look now at the marketing and technology tools that Keller Williams provides.

Leads: The Lifeblood of Your Business

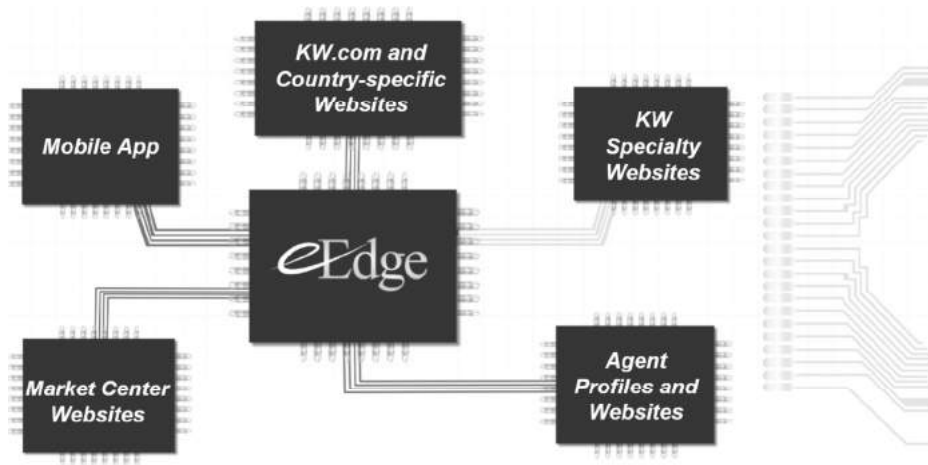
First, let's talk about your #1 job—lead generation and conversion.



Because getting and converting leads is an agent's most important activity, and we know that 90 percent of home buyers start their search online, we have a vast lead generation network of websites and systems that work together with a single objective: to connect potential clients to our associates. That's our ONE Thing.

There are more than 100,000 websites in our lead generation network, giving our associates presence and power in online searches. All of these websites work together with one objective: to connect potential clients to our associates. We aim to make our agents the premier resource for consumers looking for real estate online in their market because they are the experts.

KW Lead Network



We also want to make sure our associates are squarely in the path of online consumers so that they're the first ones consumers find! Sixty percent of consumers pick the first agent they interview. We want our agents to get the appointment first.

To walk you through the lead network, we will start with KW.com and country-specific websites.

KW.com and Country-specific Websites

KW.com is a consumer site that provides accurate and timely information on buying and selling real estate. The site's main goal is to assist consumers in locating a professional real estate associate in as few clicks as possible. The site adapts to the visitor to make them feel as if we are right around the corner, but also have the size and power of a large national company. We look at where website visitors are located and what they're searching for. We remember that information so the next time those consumers come to the site, they'll see localized photos and featured listings in the area they last searched.



KW.com links together the IDX (broker reciprocity) solutions of our brokers across North America to provide a search for all area properties across the United States and Canada. We determine the IDX solution to drive the consumer to based on the territories defined in your franchise agreements.

Outside the United States, we power country-specific websites that have a localized feel and a property search that's contained to that country.

KW.com and our country-specific websites consistently carry the message that using a real estate professional saves the consumer time, money, and risk. These sites are *not* designed to capture consumers for the purpose of selling them back to our associates for a referral fee. In alignment with our core philosophies, the agent is first and foremost the most important brand to promote.

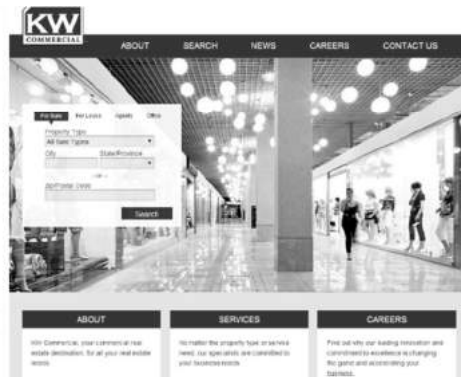
We also believe that agents work hard for listings and deserve all the leads that come from them. That's why whenever our agents' listings are marketed on these sites, all the leads go to the listing agent. We call that our "My Listings, My Leads" philosophy.

KW Specialty Websites

For our agents who serve specialty markets, such as luxury and commercial clients, we provide a specialty web presence.



KWLuxuryHomes.com



KWCommercial.com

KWLuxuryHomes.com features all Keller Williams listings above the luxury pricepoint for that market, whether or not they belong to a member of KW Luxury Homes International. While member agents are showcased on the site, the My Listings, My Leads rule applies here too. We could have decided to take leads and assign them exclusively to members, but the board decided that if it's a Keller Williams listing, the lead should go back to that Keller Williams agent, regardless of their membership.

Many agents ask why this site has no IDX. The ultimate goal with this site—as well as with KW.com—is to connect people, not with our national sites, but rather, with your local luxury homes business. We want to bring clients in with the listing inventory that we have, but want to make sure that they stick with you, not with us.

The KW Technology team also builds and powers KWCommercial.com—the website for the commercial real estate arm of Keller Williams Realty.

KW Commercial agents have the Keller Williams Commercial Listing System (KWCLS), which syndicates all listings to dozens of commercial websites daily.

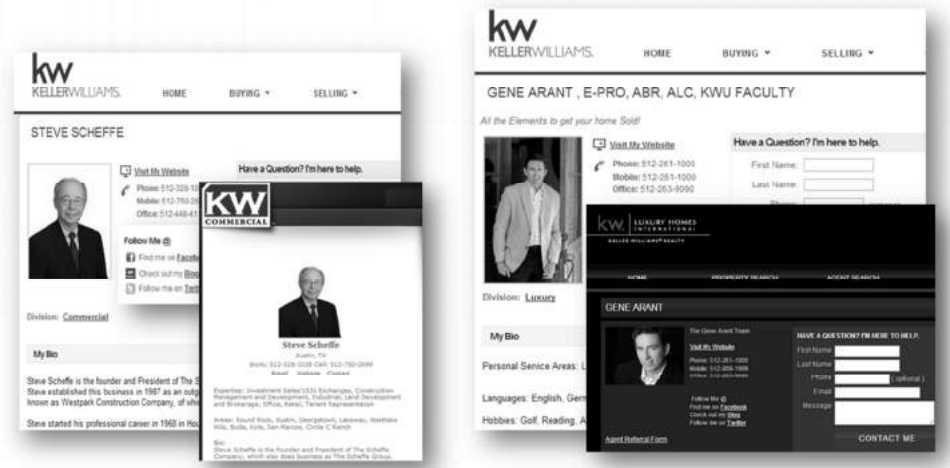
Every KW Commercial agent can list all KWCLS listings as their own, expanding their personal websites by thousands of webpages. Additionally, each KWCLS listing has its own unique webpage on KWCommercial.com, which has a call to action for the listing broker.

Agent Profiles

Every Keller Williams associate automatically receives an agent profile, which can be found through the agent search function on national-level and office-level websites.

This is powerful for our associates, especially for those who don't want to maintain a personal website yet want a professional, branded, online presence.

As soon as associates are activated in myKW and enter just a few pieces of information in their White Pages profile, they can be found on our websites.



ACTION ITEM

Ensure that your Market Center's White Pages profile is completed, as well as your agents' profiles. Make sure that when consumers find your agents through the search on national-level or office-level websites that their profiles are complete and up-to-date. Profiles can be edited by going to myKW.kw.com, clicking **White Pages** in the Quick Links section in the lower right corner, and then searching for an agent's or office's profile

Market Center Websites

Every office, including Market Centers and Business Centers, is provided a powerful local website that looks and feels like KW.com.



Some of the best features of these sites are:

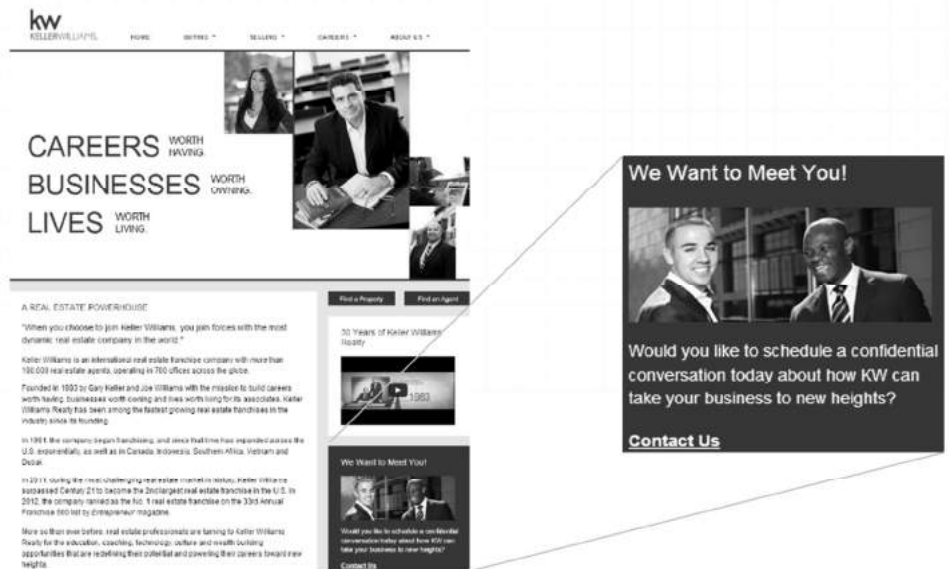
- The photos are all customizable. You can upload up to 8 photos and have them scroll through on your site just like KW.com does.
- They are powered with WolfNet IDX (where available), so your agents' listings are indexed as part of your Market Center's website content. This means that Google and other search engines will see your Market Center website growing in number of pages, because each listing technically is its own page.
- You can add WolfNet Map Tracks to your website—a highly interactive and easy-to-use way to search properties.
- Your office's listings are highlighted on the home page as featured properties.
- And again, just like all our products, the office websites follow the My Listings, My Leads rule. All IDX leads on Keller Williams listings are sent directly to the listing agent, regardless of what office that agent is in.

ACTION ITEM

Request WolfNet IDX for your Market Center, if available in your area. Ask your Regional leadership for the KW Market Center Request Form, and send the completed form to support@kw.com to get started.

Lead Capture for Recruiting

By the way, our national- and office-level websites don't just capture buyer and seller leads. There are also several opportunities for prospective agents to contact you about a career with Keller Williams.



Agent Websites

The most important lead sources are the KW agent websites. In addition to an agent profile, every associate receives two websites they can use to establish a strong web presence and become the premier resource for consumers looking for real estate online.

- The eAgentC website is highly customizable. Associates are provided with a selection of predesigned, attractive, content-rich website designs that can be tailored to their own customer base.
- The eEdge website can be launched in minutes—it's truly set it and forget it.

Both websites are powered with full IDX (where available).



eAgentC: Customizable



eEdge: Set it and forget it

Mobile App

Made for iPhone and Android phones and tablets, the KW mobile app is yet another way to keep our associates top of mind with their clients.

A study by the National Association of REALTORS® and Google also supports the fact that the use of mobile apps is becoming an increasingly popular way for buyers and sellers to find their next home. Of those surveyed, 68 percent of home shoppers reported using mobile apps at some point during their real estate search.

True to our agent-centric philosophy, we didn't build just one app—we built one for every single agent. Every KW mobile app is individually branded with the agent's name and contact information, and displays completely localized listing information. Our agents can give their clients a nationwide search without ever leaving their app.

Your Market Center also has a branded app, just as your Market Center has a website. In fact, you can think of your Market Center app as an extension of your office website.

With a single tap, clients can search for nearby homes and connect with a knowledgeable agent in the search area. Leads from any listings on an agent's branded app go directly to that agent. My App, My Leads!



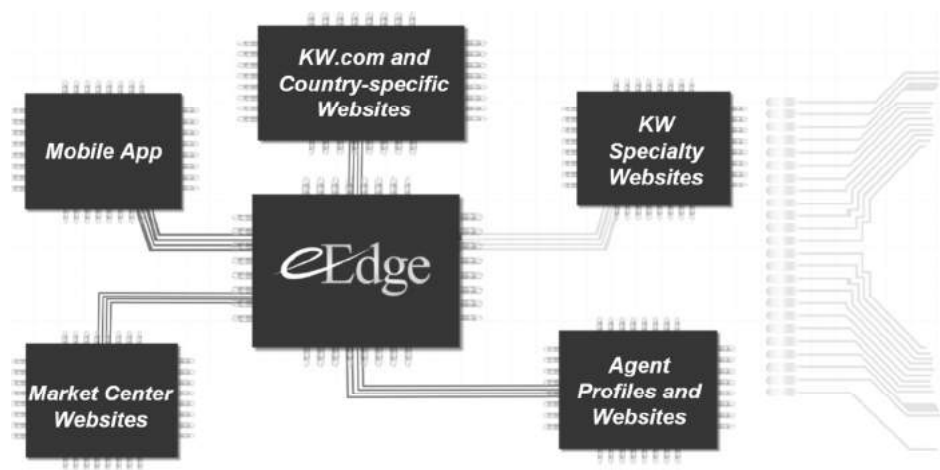
ACTION ITEM

Download, install, and explore the Keller Williams Realty Real Estate Search app from your mobile app store.

All Leads Go to eEdge

So, our agents have leads coming in from all over the Internet. They've cast their net wide using the KW lead network. How are they going to manage all of these leads? That's where eEdge comes in.

When we conceived eEdge in 2010, it was in direct response to a study that showed that on average the industry left 67 percent of online leads unanswered. When we sat down with our agents, we quickly realized that it wasn't their fault! They had leads coming in from all over the place – email, contact forms, listing inquiries—and much of the time, they didn't know the leads were there. There was no way to systematically handle leads from various sources. So, eEdge was built to help ensure our agents' leads didn't fall into that 67 percent.



Your Lead Conversion to Close Solution

eEdge is actually more than just lead management. It's a system to manage the entire lead conversion to close process, and it's used by agents as well as leadership. After all, as leadership, your business activities really aren't all that different from those of an agent, when you think about it. Just as your agents are constantly working to convert leads to clients, you're working to recruit new talent and retain your agents in order to grow your Market Center.



Notice how the components of eEdge fit neatly into the MREA model of Leads, Listings, and Leverage.

- Because your business is your database, your contact management system—**myContacts**—is at the core of eEdge
- myContacts is fed by **myLeads**—the lead management system
- Leads are cultivated and listings are advertised with **myMarketing**
- Finally, contracts are closed through **myTransactions**

Let's take a closer look at the lead conversion components of eEdge.

myLeads

Regardless of where an online lead comes from—whether from an agent website or mobile app, Market Center website or app, a listing landing page, or anywhere within the KW lead network—everything gets funneled into one place: eEdge myLeads.

When new leads register on an agent's eEdge website, they instantly appear on the myLeads Dashboard, which quickly gives agents information about that person's wants and needs. What area are they looking in? In what price range? Did they save any of their favorites? Are they just browsing or are they ready to work with an agent now? All information to help the agent make an informed, personal follow-up call. In fact, myLeads provides agents with an "Initial Contact Wizard" that provides a script for making that first call.

And, eEdge lets agents know immediately when new leads come in. Agents can set up alerts in eEdge so that they're notified instantly by text and/or email when a new lead hits their myLeads Dashboard, allowing them to follow up before the next agent gets there. This is critical, as today's consumers have a very low tolerance for a delayed response. And, if a lead comes in while an agent is on holiday halfway around the world, eEdge will automatically follow up with that lead on the agent's behalf, making sure that none of our agents' leads fall into that 67 percent that go unanswered. As we like to say, "eEdge has your back."

All leads are automatically added to myContacts as soon as they hit the Dashboard.

The screenshot displays the eEdge myLeads Dashboard. At the top, a large funnel graphic contains the eEdge logo. Below the funnel is a navigation bar with links: Dashboard, Inbox, Contacts, Market My Listings, Search MLS, Create Marketing, Admin, and Help. The main section is titled "New Contacts (10)" and includes a "View all" link. Below this is a table with columns: Contact, Looking In, Avg Price, View, Save, Created, Activity, Status, and Actions. The table lists three contacts: Melissa Henderson, Melissa & John Henderson, and Sandra Sellerhome.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
Melissa Henderson		\$0	0	0	9/20/12	-	Lead	
Melissa & John Henderson		\$0	0	0	9/20/12	-	Lead	
Sandra Sellerhome		\$0	0	0	9/19/12	9/19/12	Lead	


ACTION ITEMS

- **Establish a process for routing Market Center leads that come into your office's shared email account (klrw###@kw.com).** For help with this, view this tutorial video: **kwconnect.kw.com > Leadership > Technology for Leadership > eEdge > Manage Your Market Center Leads.**
- **Ensure all agents have activated their eEdge Lead Alerts so that they can respond immediately when a lead is routed to them.** Direct agents to the following tutorial video so they can turn on lead alerts: **kwconnect.kw.com > Agents > Technology Training > eEdge myLeads/myContacts > How to Add eEdge Lead Notification Alerts.**

myContacts

Here's a glimpse of a contact summary page in myContacts, which is a complete contact management system. myContacts lets you organize your contacts into groups, set follow-up reminders, and track every communication and activity you've had with each contact, including contracts.

- Agents can organize their contacts into one or more groups, such as buyers, sellers, investors, friends ... anything they want.
- Leadership, you can also use your office's version of myContacts to organize your recruits into groups (by productivity level, by recruiting source, or both). Your current associates can be managed in myContacts as well so that you can stay in touch with them and remind them why they joined KW in the first place with a variety of retention communication pieces.

 **Contacts** > Add a Contact

Save

Primary Details

Status: Lead	Timeframe: Now
Name: Title First Name Last Name Suffix	Type: Buyer Subtype
Nickname: <input type="text"/>	Phone Number: Home Phone Cell Phone Work Phone
Gender: Unspecified	Email Address: Primary Email (Primary) Secondary Email Tertiary Email (e-Signature)
Company: <input type="text"/>	
Job Title: <input type="text"/>	
Birthday: <input type="text"/>	
Anniversary: <input type="text"/>	
Referral Info: <input type="text"/>	

Address

Address Title: <input type="text"/> <input checked="" type="checkbox"/> Mailing Address	
Address: <input type="text"/>	
City: <input type="text"/>	State/Province: Select a State
Zip/Postal Code: <input type="text"/>	Country: USA
Property Type: All Types	Beds: Any
Square Feet: Select One	Baths: Any

Secondary Details

Name: Title First Name Last Name Suffix	Gender: Unspecified
Nickname: <input type="text"/>	
Relationship: <input type="text"/>	Family Members: <input type="text"/>


ACTION ITEM

Schedule a recurring task to clean up your office contact database of current agents and recruits. On a regular basis, ensure that your database of agents inside and outside your Market Center is up-to-date. For help, view this tutorial video: kwconnect.kw.com > **Leadership** > **Technology for Leadership** > **eEdge** > **Get Your Database In Order.**

myMarketing


myMarketing is a world-class design tool allowing your associates to quickly and easily create high-end marketing pieces—from listing presentations to property fliers to fully automated touch campaigns. It is seamlessly integrated with myContacts, KWLS, and other KW systems to make marketing a snap. There are materials to help agents cultivate new leads and stay in touch with past clients so they can generate repeat business and referrals.

DESIGN LIBRARY




Market Listings
Market your listings with easy, polished designs.

[Email](#) [Fliers](#) [Postcards](#)



Email Marketing
Keep in touch with contacts using targeted email messaging.

[Newsletters](#) [Greetings](#)



Postcards
Integrate printed postcards into your marketing plan.

[Jumbo](#) [Panoramic](#) [Regular](#)

Design Library ▾

Search

CAMPAIGNS


[My Saved Campaigns](#)
[Create New Campaign](#)

PORTFOLIO


[My Saved Designs](#)
[Image Manager](#)

MY ACCOUNT


[Shopping Cart \(0\)](#)
[Order History](#)
[Manage Payment Options](#)




Keller Williams Marketing



Just Listed Postcards



Just Sold Postcards



Free shipping (in continental US)

Build Relationships with 8 x 8

The 8 x 8 lead generation campaign pieces to attract new buyers and sellers are graphically appealing and contain timely information relevant to the market of the moment.

As always, each piece is customizable and the campaigns can be launched in just a few clicks. Once launched, the campaigns automatically deliver each piece, on schedule, until the last piece is sent, and then agents are reminded to start a new campaign for those contacts.



Cultivate Relationships with 33 Touch

After an 8 x 8 campaign ends, agents can continue to build and strengthen those relationships with a 33 Touch campaign, which consists of 33 “touches” over one year. By immediately following an 8 x 8 with a 33 Touch, they’ll be reminding their contacts of their value—and sending them relevant, useful information—41 times in 14 months. This is how Keller Williams Realty agents stay top of mind!



Target Specialty Buyers and Sellers

You'll also see materials for agents in specialty markets (commercial, luxury, or global property) to use in targeting their specific set of buyers and sellers.



Win Buyer and Seller Business

We found that the vast majority of agents do not conduct buyer consultations or even get buyer agreements signed before taking potential buyers out to view homes. The buyer presentation templates in eEdge are intended to be used as tools throughout the consultation to keep agents on track. They enable agents to take a systematic approach to working with buyers—delving into buyers' needs, wants, and values, and showcasing the agent's services. Most importantly, the buyer presentations will educate and set expectations for how your agents work.

And, Keller Williams stands behind our agents at every listing appointment with prelisting and listing presentation templates that help them stand out from the competition and get a signed agreement.



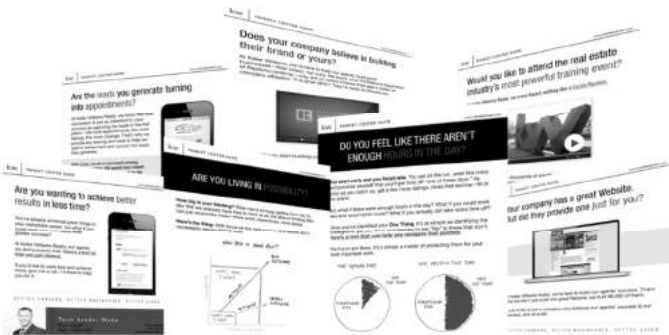
ACTION ITEMS

- Promote buyer presentations to your agents to help them expedite buyer agreements.
- Encourage agents to customize listing presentations before their appointment.

Recruiting Campaigns

Because **growth** of the Market Center is a Team Leader's top *priority*, **recruiting** is your top *activity*.

Just as eEdge provides multiple marketing campaigns for agents to generate and convert leads, the leadership edition of eEdge has a separate library of marketing campaigns to use in your recruiting efforts. Attract talent with world-class marketing designed to establish Keller Williams Realty as the company of choice.



Retention Campaigns

Because growth can't be sustained unless you keep the agents you've recruited, **retention** is your next most important activity.

Putting agents first is the key to a profitable Market Center with an unbeatable culture. Leverage eEdge to make Keller Williams Realty the company they keep. Keep your top talent with campaigns that are designed to easily connect you with your agents.



ACTION ITEM

Put your recruits and current agents on relevant touch campaigns. After you've organized your office contact database into groups, put each group of agents on the most relevant touch campaign. For help, view the tutorial videos found here: kwconnect.kw.com > **Leadership** > **Technology for Leadership** > **myMarketing for Leadership**.

MyKW Marketing

As you've seen, eEdge is your place for automated campaign materials.

On the **Marketing** page on myKW.kw.com, you'll find additional digital and print materials—varying artwork and designs, ad templates, direct and indirect advertising campaigns, free downloads, and more—all geared toward making your business stand out in the market.

Leadership, you have an entire “toolbox” full of customizable marketing materials used to promote and grow any associate's business.

MARKETING

The Marketing Section of myKW is your central spot for customizable marketing materials used to promote and grow your business. The tools you will find here include digital and print materials—varying artwork and designs, ad templates, direct and indirect advertising campaigns, free downloads and more—all geared towards making your business stand out in the market.

Automated Marketing Suite	For All Associates	For Agents	For Leadership
<p>As a real estate agent, your focus is finding and serving clients—NOT creating and managing marketing campaigns. Now you have access to customizable presentations, fliers, postcards and automated touch campaigns for everyone in your database.</p> <ul style="list-style-type: none">• eEdge myMarketing	<p>Looking for the latest news from KW to share with your network? Want to be the local real estate wiz on social media? Interested in updating your campaign looks? You're in the right place!</p> <ul style="list-style-type: none">• Logos and Identity• Press Releases• Social Media Sources• FAQs	<p>From start to finish, this is where you'll find all the marketing materials you'll need to get your business off the ground and running—from business card layouts to buyer campaigns to listing presentations.</p> <ul style="list-style-type: none">• Business Basics• Market My Business• Market My Listings	<p>Build your team, motivate your agents, educate your market center and be a leader in your industry with the tools found here—from recruiting materials to training events to ways to gain a competitive advantage.</p> <ul style="list-style-type: none">• Business Basics• Leadership Toolbox

Leadership Toolbox

The Leadership Toolbox has everything you need to build a recruiting presentation, promote training and events, stay in touch with agents inside and outside your office, and articulate your competitive advantage.



LEADERSHIP TOOLBOX

BUILD A RECRUITING PRESENTATION	PROMOTE TRAINING & EVENTS	STAY IN TOUCH	GET YOUR COMPETITIVE ADVANTAGE
 <p>2014 Recruiting Presentation Essential Materials KW Commercial Luxury Homes by KW</p>	 <p>Market Center Education & Training Keller Williams Events</p>	 <p>Organize your Recruiting Database Launch a 33 Touch Recruiting Campaign KW YouTube Videos KWConnect Guest Pass</p>	 <p>KW vs. Industry KW White Papers Advertising Campaigns Press Releases RealWealth Publication</p>

Keep your top talent with event-specific campaigns, fliers, and e-greetings. Marketing pieces are designed to easily connect you with your agents. Highlight agent accomplishments and milestones with marketing that feels personalized.



ACTION ITEM

- Use the prebuilt recruiting presentation at your next appointment.
- Use the prebuilt fliers to promote your next event.

Listings: High-Leverage, High-Return

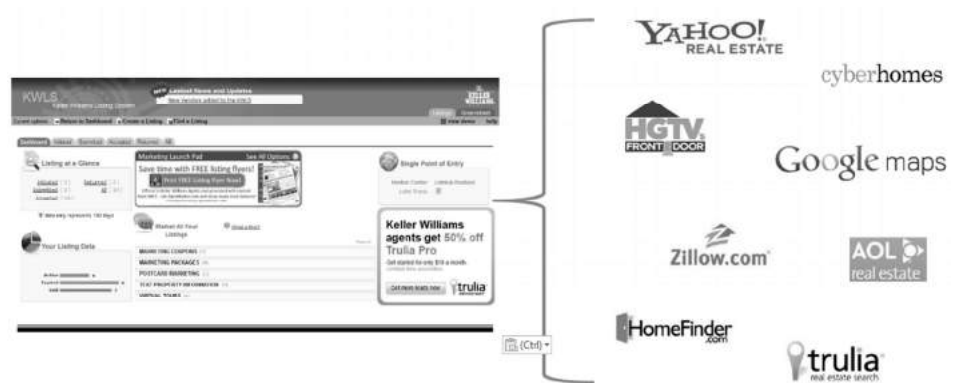
Back to our MREA models, let's talk about the second-most important focus area—**listings**. Listings are critical to an agent's ability to build their business to the highest level with the lowest costs and highest net.



KWLS and Listing Syndication

To ensure our agents' listings get the maximum exposure online, we created the Keller Williams Listing System (KWLS). This system allows agents to market their listings online when they want, where they want.

When agents enter their listing into the KWLS, we take that listing and create a single property website for it. The listing is also distributed across a powerful syndication network of more than 300 different sites, a few of which are shown here.



We partner directly with the top publishing sites to ensure our leads are never sent to any other agent. Part of our agreement with our syndication partners states that if someone on their site requests more information about the listing, we route that inquiry back to this single property site which, conveniently enough, is branded with the listing agent's photo and contact information. This is how we get our partners to adopt our My Listings, My Leads philosophy. And if a site doesn't want to follow our model, they don't get to play with us.

KWLS was built several years ago to protect our agents. Now that many multiple listing services (MLSs) are starting to syndicate their listings themselves, our agents are just now really understanding what that protection means. Many areas are stopping syndication from their MLS and only syndicating through the KWLS for that reason! If your office is syndicating through your MLS and not the KWLS, we encourage you to rethink that position. MLSs don't think every single day about protecting Keller Williams agents, but we do.



Capture Leads with Listing Landing Pages

When agents enter their clients' listings into the KWLS, those listings, as you know, get maximum exposure because they are syndicated across a wide network of real estate websites. The KWLS difference is that our agents have control over where inquiries on those listings go. All buyer leads go directly back to the listing agent—My Listings, My Leads.

When a lead clicks to view the “listing website,” they’ll be taken to the listing landing page, shown here, which contains several calls to action.

Also, the advantage of using the KWLS instead of their MLS for advertising listings is that agents can enhance their listings in the following ways:

- Add up to 30 photos per listing
- Add their branding and watermarks to listing photos
- Include a link to a virtual tour
- Write a longer listing description, which can include their name and contact information
- Include more fields to be used in search filters
- Each KWLS Listing has its own unique listing landing page with its own unique URL.



ACTION ITEM

- **Ensure your agents are entering their listings into the KWLS**—either manually or via KW Connector.
- If your office has Listhub enabled, run the report at **Reports > Web Statistics > Listhub Exceptions** to ensure it's working correctly and to catch any errors.

Marketing Listings

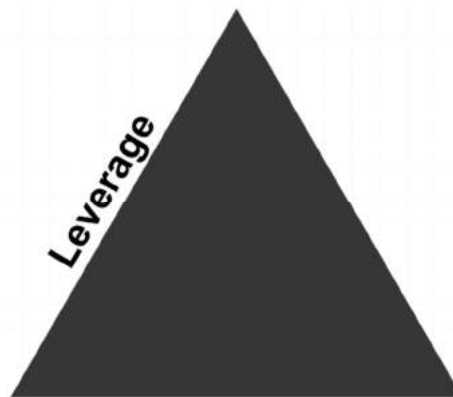
And when it's time to market listings, turnkey marketing solutions save our agents time and money.

As we mentioned, eEdge myMarketing is integrated with the KWLS, allowing agents to quickly create professional property fliers and postcards. Agents can even generate a unique URL for each marketing piece so that they can post it to their website or blog, or share with their social networks.

Once an agent customizes their marketing piece, they can save it and send to their contacts by email, they can print and hand-deliver, or they can have them professionally printed and mailed for you. This is a great resource for getting the word out when an open house or listing sells!



Leverage: So You Can Focus on What Matters

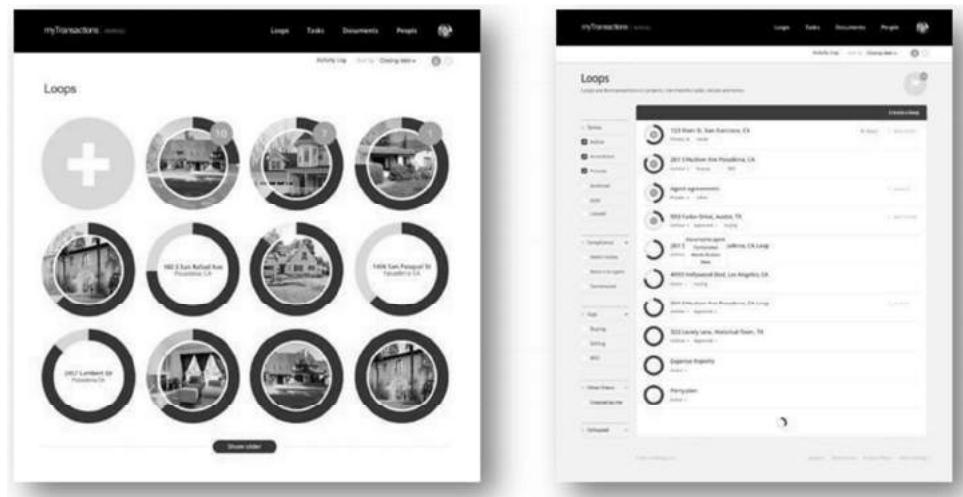


So, we've talked about leads and listings. When agents give those areas of their business full attention, they'll reap the rewards and will be ready to start leveraging help.

Keller Williams Realty has some of the most advanced real estate technology tools out there. When fully leveraged, these tools save our associates thousands of dollars in systems development, software programming, and graphic design spends.

myTransactions

myTransactions is a true electronic solution including interactive online forms, e-signature capability for all parties, and transaction management. This time- and money-saving solution offers full integration with myContacts and the KWLS, resulting in greater agent and Market Center efficiency.



ACTION ITEM

Customize your Broker Dashboard settings to match your office's compliance workflows. For help, view the tutorial videos found here: kwconnect.kw.com > Leadership > Technology for Leadership > myTransactions for Leadership > The Basics of the Broker Dashboard.

Action Plans

You've seen the core components of eEdge already. But there's more!

Also available in eEdge are action plans to help agents stay on track with their clients by displaying their most pressing tasks on any given day. These to-do items might be phone calls, emails, appointments, or just general to-do items. Agents can assign tasks (or entire action plans) to other associates, even in other Market Centers. This is a great resource for agents who work as a team, whether or not they're in the same location.

Action plans can be used as is, or as a template to create a customized plan. Associates can even create new action plans from scratch to match their unique business procedures.

Leadership, you also have action plans for recruiting, retention, and more.

The image displays two screenshots of the 'kw ACTION PLANS BETA' web application. The left screenshot shows the 'Initiate Plan' section, which includes a 'Show 10 entries' dropdown and a table with columns for 'Template Name' and 'Template Description'. The table lists several templates: 'Luxury Agent Referral', 'Mega Retention', 'Met Contact', and 'New Agent Tech Setup'. The right screenshot shows the 'Dashboard' view, which includes a 'Show 10 entries' dropdown and a table with columns for 'Task Name', 'Assigned To', 'Due', 'Status', and 'Add Calendar'. The table lists various tasks, such as 'MLS: Add open house', 'Schedule, instruct, open house', 'Print map of neighborhood', 'Ballroom: Place order for sand and directional signs', 'myKWI Market Center: Communicate open house to Market Center', 'H.A. post', 'MLS: Add open house', 'Invite "met" from your database to open house', 'Open House - Internet access or mobile device', 'Home Book Binder for display at open house', and 'Print new black buyer representation agreements to take (print or scan)'. The dashboard also includes a 'Mark as Complete' button and a 'Showing 1 to 10 of 24 entries' indicator.

eEdge On the Go

For agents who are truly mobile, they will love eEdge on the Go—a mobile-optimized version of myKW.

Here's how it works:

1. Imagine you're an agent. You're out and about, and you get a lead alert from eEdge on your phone. Using a shortcut you've saved to your phone home screen, you log into myKW.kw.com and arrive at the mobile version of your eEdge dashboard.
2. You select myLeads and see a list of your new leads with a snapshot of what they're looking for.
3. Select the new contact and view their full contact record just as you would from your desktop. From here, you can call them, send an email, and then place them on a campaign after you make contact.
4. And because it's a mobile-optimized website, there's nothing to download, and it doesn't matter what kind of mobile device you're on.



Performance Metrics

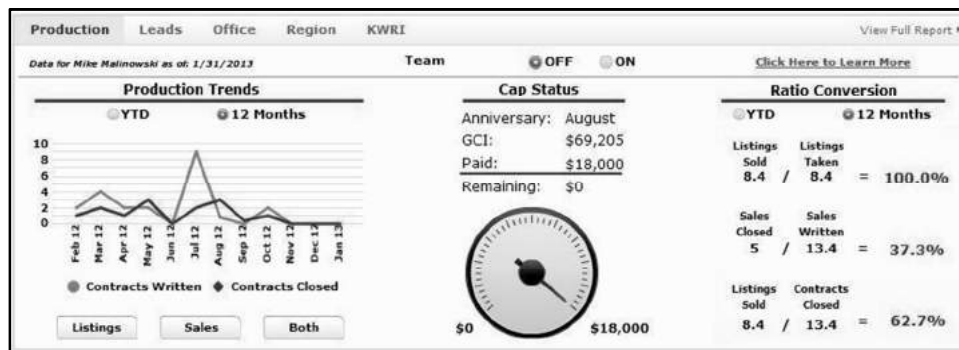
Another key concept from the MREA is “know your numbers.” Millionaire Real Estate Agents know their goal numbers and track them. Knowing your numbers builds confidence and stability in your individual or team’s business.

eEdge Performance Metrics for Agents and Teams gives you more visibility and accountability into your production and leads.

Right from the home page of myKW.kw.com, you have easy access to all the metrics most important to your business. As an agent, you can instantly see your production numbers, cap status, and ratios to put those numbers in perspective. You also have visibility into the number of leads you are generating and where those leads are coming from, so you can better focus your efforts.

As a team member, you have the same kind of visibility not only for your numbers, but for your team’s: both collectively and as individuals.

Office leadership can see their Market Center’s numbers, compare goals against actuals, and know how they rank both in their Region and in all of KW. Regional leaders have similar insight into their regional goals, stats, and rankings. And, of course, Mark Willis can see the company’s numbers whenever he wants them!



ACTION ITEM

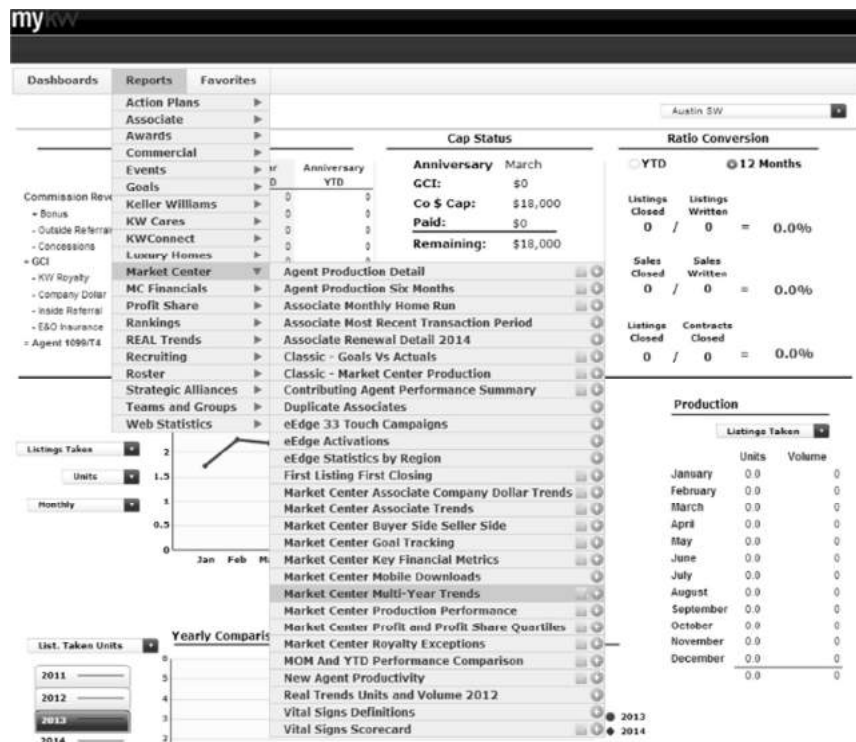
Use the performance metrics in your coaching sessions with agents in your Market Center..

Reports

To find even more numbers, you have the Reports Suite on myKW.kw.com. Reports make it easy to get answers to even more questions—where can I find a roster of everyone in my Market Center? Who are the top-ranked agents in terms of GCI? Which agents have the most branded mobile app downloads? Who’s using eEdge in your Market Center and who isn’t?

Depending on your role in the myKW system—agent level or leadership level—you’ll have access to different reports to help you measure your success and make informed business decisions.

There are so many reports available that finding the one you want can be a bit overwhelming. Mark the ones you’ll refer to over and over as “Favorites” so you can pull them up easily, right when you need them. When you locate the reports, click the icon with a “plus” sign in the green circle to save them as favorites.



ACTION ITEM

Mark your these two critical reports as favorites to support your Market Center’s growth initiative.

- Reports > Market Center > Market Center Multi-Year Trends
- Reports > Market Center > Vital Signs Scorecard

KW Google Apps for Business

Speaking of Google, Keller Williams is excited to provide all of our associates with KW Google Apps for Business—a cloud-based productivity suite of leading-edge solutions to help associates grow their businesses and better serve consumers.

This collection of apps helps agent and leadership associates and teams get work done from anywhere, on any device.

The core Google apps are the fundamentals—mail, calendar, storage and collaboration tools—of using Google in your business. Once you have the core apps in place, start working in additional apps into your business.

KW associates have all of these apps available to them as part of their monthly technology fee.

Core Apps:



[Gmail](#)
Email wherever you work



[Calendar](#)
Shareable, cloud-based calendar



[Drive](#)
Your online office productivity suite



[Hangouts](#)
Virtual chat with up to 15 participants

Additional Apps:



[Google+](#)
Put your most professional side forward on social media



[Maps](#)
Easily share listing routes with your clients



[Places](#)
Your tool for better SEO for your business



[Voice](#)
Manage all your phones with one central phone number

- [YouTube](#)
- [Analytics](#)
- [Blogger](#)
- [Books](#)
- [FeedBurner](#)

- [Finance](#)
- [Google Custom Search](#)
- [Map Maker](#)
- [Moderator](#)
- [News](#)

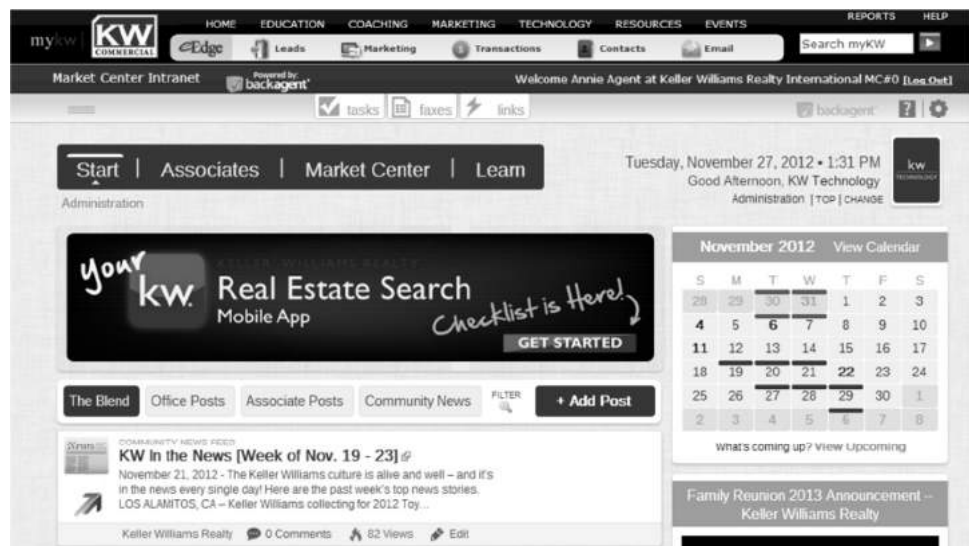
- [Panoramio](#)
- [Picasa](#)
- [Translate](#)
- [Webmaster Tools](#)

Market Center Intranet

Another powerful tool to help associates work together and stay in touch is the Market Center Intranet. Powered by BackAgent, every Market Center has an intranet to streamline communication in the office and keep everyone informed of critical information.

Market Center and Regional leadership can use this to:

- Promote key events, share featured events, training, classes, listings, agent successes, new agents, and sales reports with the whole team.
- Enter events for the entire Region or just the Market Center on the intranet's calendar, which can then be synced with your Google calendar and shared publicly.
- Set up, manage, and schedule resources, such as phone duty shifts or a conference room. Associates can sign up to reserve resources, as permitted by management.
- Create custom email distribution lists or add to the global distribution lists. Leadership can email individuals, associates with specific roles, their custom lists, or the entire Region or Market Center.
- Adjust and customize the types of content that can be published by the associates at any time.
- Send emergency or mission-critical messaging to everyone or only to select associates to make sure the office is informed.



ACTION ITEM

Add upcoming training events to your Market Center Intranet calendar. Then publish your Market Center Intranet calendar to a Google calendar and embed in your Market Center website. Sharing your training calendar publicly can attract new agents.

Stay in the Know

myKW.kw.com

The home page of myKW.kw.com is a single place that gives associates easy access to the resources needed to run their businesses.

Each day, you'll see upcoming events sponsored by KWRI and top KW news stories. The "Scheduled Events" calendar also includes live webinars delivered by the KW Technology training team every day at 2:00 p.m. (Central Time). Monday webinars are focused on Ignite, specifically how to put the concepts you learn in Ignite into action using KW technology and marketing systems. Tuesdays complement the Internet Lead Generation course, and Wednesday webinars are for leadership. Just register once for any of these and you're signed up for the entire series!

This page is also the launchpad for KW systems we've talked about today—eEdge, Performance Metrics, Reports, and the Market Center Intranet.

The screenshot shows the myKW.kw.com homepage. At the top is a navigation bar with links: myKW, HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, and EVENTS. Below the navigation bar is a welcome message: "Welcome Anna Agent - Market Center - Keller Williams Realty International MC#0". The main content area is divided into several sections. On the left, there's a "Keller Williams Realty News" section with a headline "REAL dominance." and a sub-headline "Keller Williams has 176 representatives on the 2014 REAL Trends 500... more than any other... (read more)". In the center, there's a "Scheduled Events" calendar with a table of events. On the right, there's a "Webinars and other events" section. Annotations with arrows point from the text labels to the corresponding sections on the page.

Date	Time	Event
June 05 2014	1:00 pm - 2:00 pm	The Graduate Perfect Real Estate Assistant - NARS Coaching
June 05 2014	2:00 pm - 3:00 pm	*CT* Your Business Open House
June 09 2014	2:00 pm - 3:00 pm	*CT* New Agent Monday - Ignite Session 14 - Your Probing Packet

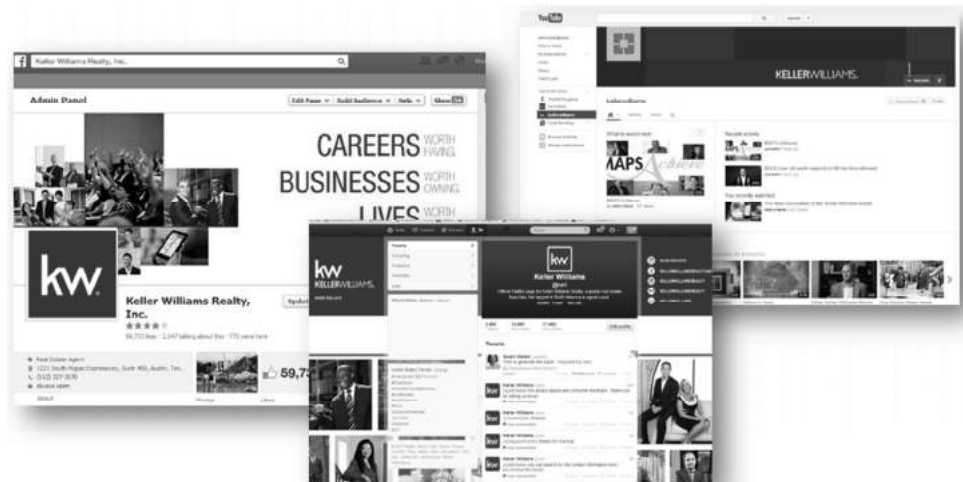
KWConnect Videos

On KWConnect, you'll find our library of on-demand video learning modules for agents and leadership alike. These videos will broaden your perspective, fuel your production, and provide you with best practices to stay on top of your game.



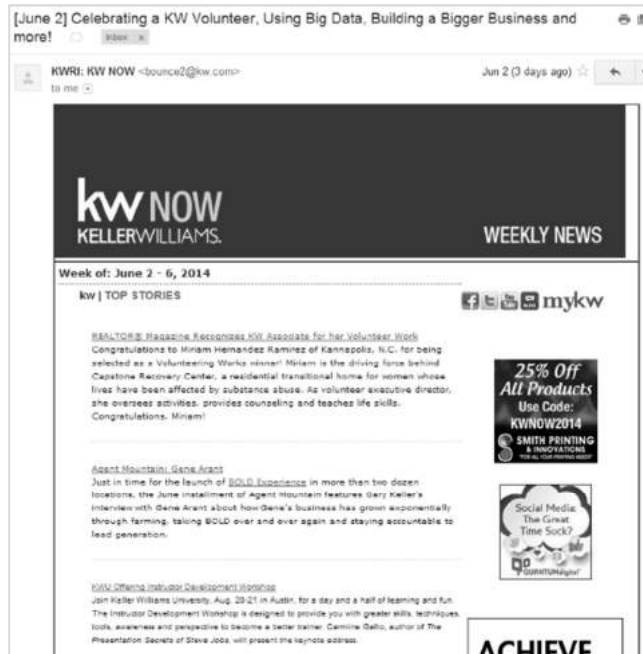
Social Media

Follow Keller Williams Realty International on social media to stay in the know, share items of interest, and join the conversation. Feel free to share and/or incorporate these posts into your own blog or social networking.



KW NOW

Finally, watch your @kw.com inbox for KW NOW—delivered to all associates every week with the most important news you need to know.



So, What's Your ONE Thing?

Now, you've seen how KW marketing and technology systems set you and your agents up for success by allowing you to focus on the activities that bring you business, and automating the ones that don't. What's your next step? What's your ONE Thing? Of everything you learned today, what's the ONE Thing you can do such that by doing it everything else will be easier or unnecessary?

It might be as simple as going back through your manual and noting which action items you'd like to complete, by when, and by whom.



Technology Setup Action Plan: Leadership

Maybe your ONE Thing is to get set up on all KW marketing and technology systems so that you can use them not only to manage your Market Center business tasks, but also to confidently talk about and demonstrate the systems with agents inside and outside your office.

In eEdge, you'll find the Technology Setup for Leadership plan. It's a series of to-do items that, when completed, will allow you to fully leverage KW marketing and technology systems in your daily business activities, gaining the potential to increase productivity and profitability for agents and for your Market Center.

The Technology Setup for Leadership plan allows your Market Center staff to fully leverage KW technology and marketing

Task Name	Assigned To	Due
01. Ensure your office contact information is displayed correctly on national websites	Oscar OP	06/09/2014
02. Ensure that all agent MLS IDs have been added to their White Pages profiles	Mike MCA	6/10/2014
03. Request WolfNet IDX if available in your area	Mike MCA	06/11/2014
04. Update your Market Center website	Tony Tech Coordinator	06/12/2014
05. Know where to find answers to frequently asked questions about Market Center websites	Tony Tech Coordinator	06/14/2014
06. Ensure agents have completed their White Pages profiles	Mike MCA	06/15/2014
07. Establish a process for routing Market Center leads that come into the kmls@kw.com inbox	Mike MCA	06/17/2014
08. Ensure all agents have activated their eEdge Lead Alerts	Terri Team Leader	6/18/2014
09. Ensure your office profile in eEdge is complete and meets compliance standards	Oscar OP	06/19/2014
10. Schedule a recurring task to clean up your agent database	Terri Team Leader	06/20/2014

Technology Setup Action Plan: Agents

And, there's one for agents as well. It's a step-by-step list of tasks you can assign to agents to ensure they know how to use all of the different marketing and technology systems we offer.

The New Agent Tech Setup action plan is a step-by-step checklist to help new associates get plugged in to KW systems right away

Task Name	Assigned To	Due
01. Login to MyKW for the first time	Annie Agent	06/09/2014
02. KW White Pages: Fill out your profile	Annie Agent	06/09/2014
03. Activate KW.com Email Address	Annie Agent	06/09/2014
04. Get Your Mobile App	Annie Agent	06/09/2014
05. Activate Keller Williams Listing System (KWLS)	Annie Agent	06/09/2014
06. Activate eEdge	Annie Agent	06/09/2014
07. Fill Out Your eEdge Contact Information	Annie Agent	06/09/2014
08. Import Your Existing Database into eEdge	Annie Agent	06/09/2014
09. Add a Single Contact to Your eEdge Database	Annie Agent	06/09/2014
10. Activate eEdge Email	Annie Agent	06/09/2014

Your Action Items

Action Item	Assign to	Due by
Ensure that your Market Center's White Pages profile is completed, as well as your agents' profiles.		
Request WolfNet IDX for your Market Center, if available in your area.		
Download, install, and explore the Keller Williams Realty Real Estate Search app from your mobile app store.		
Establish a process for routing Market Center leads that come into your office's shared email account.		
Ensure all agents have activated their eEdge Lead Alerts.		
Schedule a recurring task to clean up your office contact database of current agents and recruits.		
Promote buyer presentations to your agents to expedite buyer agreements.		
Encourage agents to customize listing presentations before their appointment.		
Put your recruits and current agents on relevant touch campaigns.		
Use the prebuilt recruiting presentation at your next appointment.		

Action Item	Assign to	Due by
Use the prebuilt fliers to promote your next event.		
Ensure your agents are entering their listings into the KWLS.		
Run the Lithub Exceptions report to ensure the KW Connector is working correctly and to catch any errors.		
Customize your myTransactions Broker Dashboard settings to match your office's compliance workflows.		
Use the performance metrics in your coaching sessions with agents in your Market Center.		
Mark your Market Center's Multi-Year Trends report as a favorite.		
Mark your Market Center's Vital Signs Scorecard report as a favorite.		
Add upcoming training events to your Market Center Intranet calendar. Then publish your Market Center Intranet calendar to a Google calendar and embed in your Market Center website.		

Notes
