Breakthrough 120

Part One: Session Two
Lead Follow-Up

kw Where Entrepreneurs Thrive®

Participant Guide
Version 1.0

Telemarketing

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

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

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Fair Housing

Warning! Buyer letters, videos and photographs may lead to Fair Housing violations. It is important to educate consumers about Fair Housing laws and talk with your broker before submitting buyer letters.

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CAN-SPAM Disclaimer

WARNING! When sending commercial email messages to U.S. recipients, you must comply with the CAN-SPAM Act of 2003 (CAN-SPAM), which requires the email message to provide the recipient with the ability to unsubscribe/opt-out of receiving future commercial emails. Contact your attorney to ensure your compliance.

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Updated 03/2026

TCPA/Do Not Call Compliance Pointers

1. **Know the Law**

- The Telephone Consumer Protection Act (TCPA) regulates calls and text messages and includes the National Do Not Call (DNC) Registry.
- Several states have their own telemarketing laws. You must follow these laws too.
- For information about the TCPA and DNC laws, visit https://console.command.kw.com/connect/learning/topics/10471
- Consult your market center or a lawyer for help with your telemarketing compliance.

2. **Get Proper Consent**

- Obtain proper consent from all consumers you call or text.
- You need prior express written consent to make telemarketing calls and texts using (1) an artificial voice, (2) a prerecorded message, or (3) an automatic telephone dialing system (which may include a dialer).
- You need prior express written consent to make telemarketing calls and texts to numbers on the National DNC Registry.

3. **Document Consent**

- Keep a record of consent from consumers and when you obtained it.

4. **Subscribe to the National DNC Registry**

- The National DNC Registry is hosted on a dedicated website (https://telemarketing.donotcall.gov/).
- • Your market center should subscribe to the Registry and applicable state DNC lists and give you login credentials and/or you should subscribe and obtain your own login credentials.

5. **Maintain an Internal DNC List**

- Consumers have a right to request that you not call or text them.
- Consumers can revoke consent at any time in any reasonable way.
- Keep a record of Do Not Call requests you receive for 5 years.

6. **Check DNC Lists Before You Call or Text**

- Before making a call or text, check to see if the number is on: (1) the National DNC Registry; (2) a state DNC list; or (3) your internal DNC list or your market center's.
- Do not rely on lead lists from 3rd parties to be DNC compliant. It is your responsibility.

7. **Honor Do Not Call Requests**

- Don't call a number on the National DNC Registry or a state DNC list unless you have proper consent.
- Don't call someone who has asked to be on your internal DNC list.

8. **Honor Calling Time Restrictions**

- Never make a telemarketing call or text before 8 a.m. or after 9 p.m. local time at the consumer's location.
- Follow any additional state law restrictions regarding when you're allowed to contact consumers located in that state.

9. **Train Your Assistants, Including Virtual Assistants**

- You are responsible if your assistants do not comply with telemarketing laws. REV. 07/11/25

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Seven Compliance Tips for AI Use in Real Estate

1. The TCPA prohibits AI-voice calls unless you have received prior express written consent from the call recipient. You must follow the TCPA and other applicable federal, state, and local laws if you want to leverage AI for use with calls and texts. Contact your attorney to ensure your compliance with applicable law.
2. Use your images compliantly—including those you upload into an AI tool and AI generated ones! Don't upload images into an AI tool unless you have the copyright owner's permission to do so. Additionally, AI companies' terms and conditions may require you to disclose if an image or person is generated by AI or altered with AI (like virtual staging), so be sure to do so if required.
3. Do not use AI to create content you wish to protect with copyright: Under current U.S. law, only human-authored works can be copyrighted, so AI-generated content is generally not protected.
4. Protect client confidentiality: Obtain informed consent before uploading client personal data or any other confidential or sensitive information into AI tools, anonymize or de-identify information if possible, and review AI providers' terms and conditions and privacy policies.
5. AI can be unreliable. You can use AI to help create content, but it's important that all the content is checked for accuracy before publishing to avoid making misleading or deceptive statements.
6. Follow all applicable advertising laws. Even if you use AI, you still need to ensure that you're following all applicable advertising rules, like including your broker's name, DBA, license, etc.
7. Keep it ethical. Avoid misrepresenting the property and your clients with AI-generated content that isn't checked. You should thoroughly review all AI-generated output and confirm that such output is factually accurate, suitable for its intended use, and complies with all applicable laws and regulations as they pertain to your intended use.

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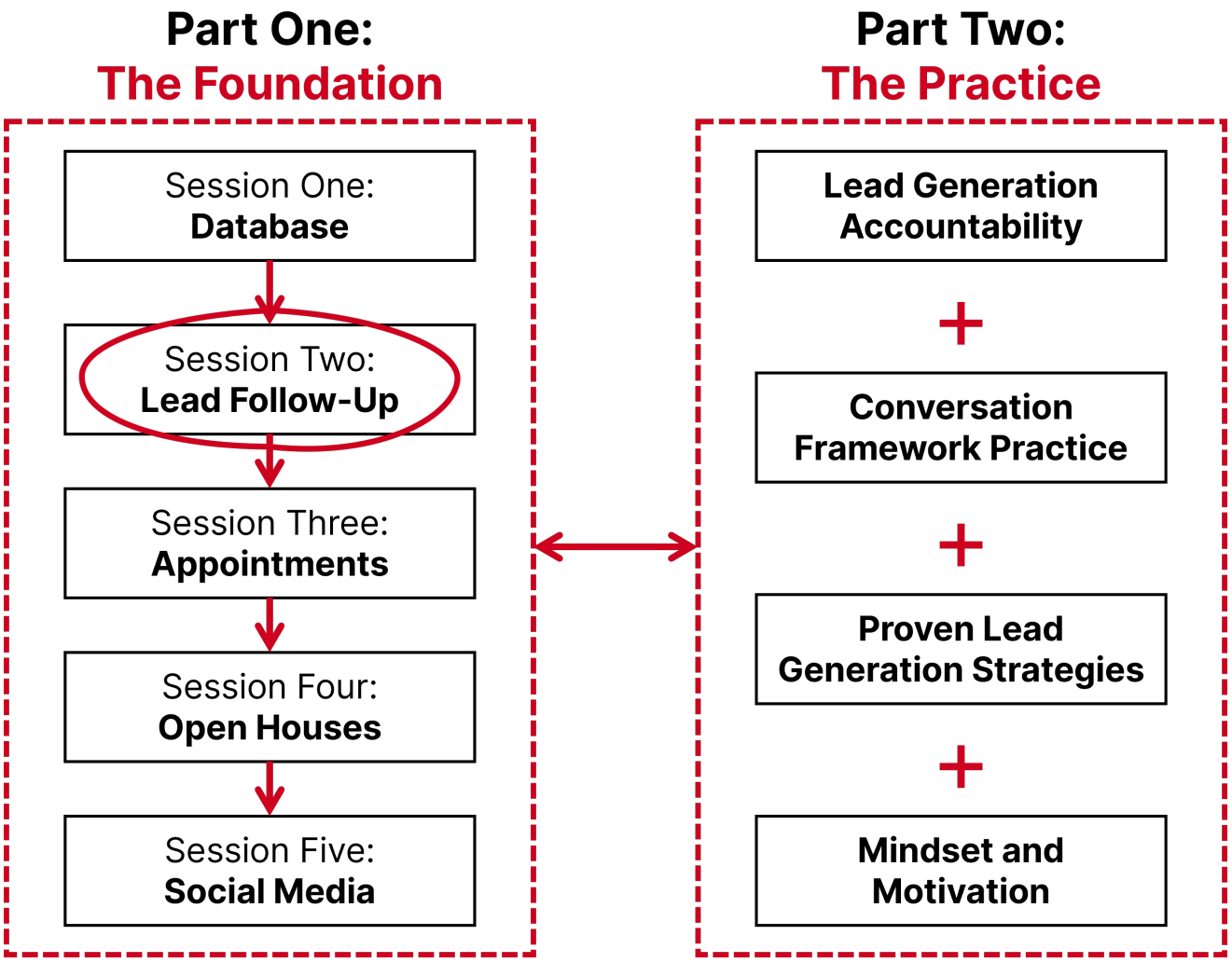
Closing 67

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Introduction

The goal of Breakthrough 120 is to have 10 real estate conversations, 5 days a week, for the next 120 days to set you up to net 9 agreements.



WARNING! You must comply with the TCPA and any other federal, state, or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

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Session Two: Lead Follow-Up

Staying in touch with the contacts in your database raises the odds that they will think of you when they have real estate needs. Having a consistent method in place, such as a SmartPlan, helps you stay organized and connected.

Objectives

By the end of the second session of Breakthrough 120, you will be able to:

1. Utilize the functions of Command® or your chosen CRM to follow up with consistent value with contacts.
2. Customize the type of SmartPlan you use with each contact based on their real estate needs to bring them value.
3. Establish the habit of regularly updating your database with the information you gather about your contacts.

Progress Report

Number of Contacts Added to Your Database	
Number of TCPA-Compliant Calls You Made	
Number of Conversations You Had	
Real Estate Follow-Up Opportunities	
Challenges	
Aha's	

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Mindset Moment

You can choose courage or you can choose comfort, but you cannot choose both.

—Brené Brown

Write down 2-3 fears you have about being a real estate agent and classify them as rational or irrational.

Rational	Irrational

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Mindset Moment (cont.)

Common fears about reaching out to your database over time might include:

1. Fear of being perceived as annoying or pushy.

2. Fear of not having enough value to offer.

3. Fear that you're doing something wrong because you aren't getting results.

AI can be a great anytime, no-pressure role play partner. Look to the **AI Playbook** on **Connect** for guidelines to create great prompts and even a specific role-play prompt you can modify to help you practice your lead generation conversation skills.

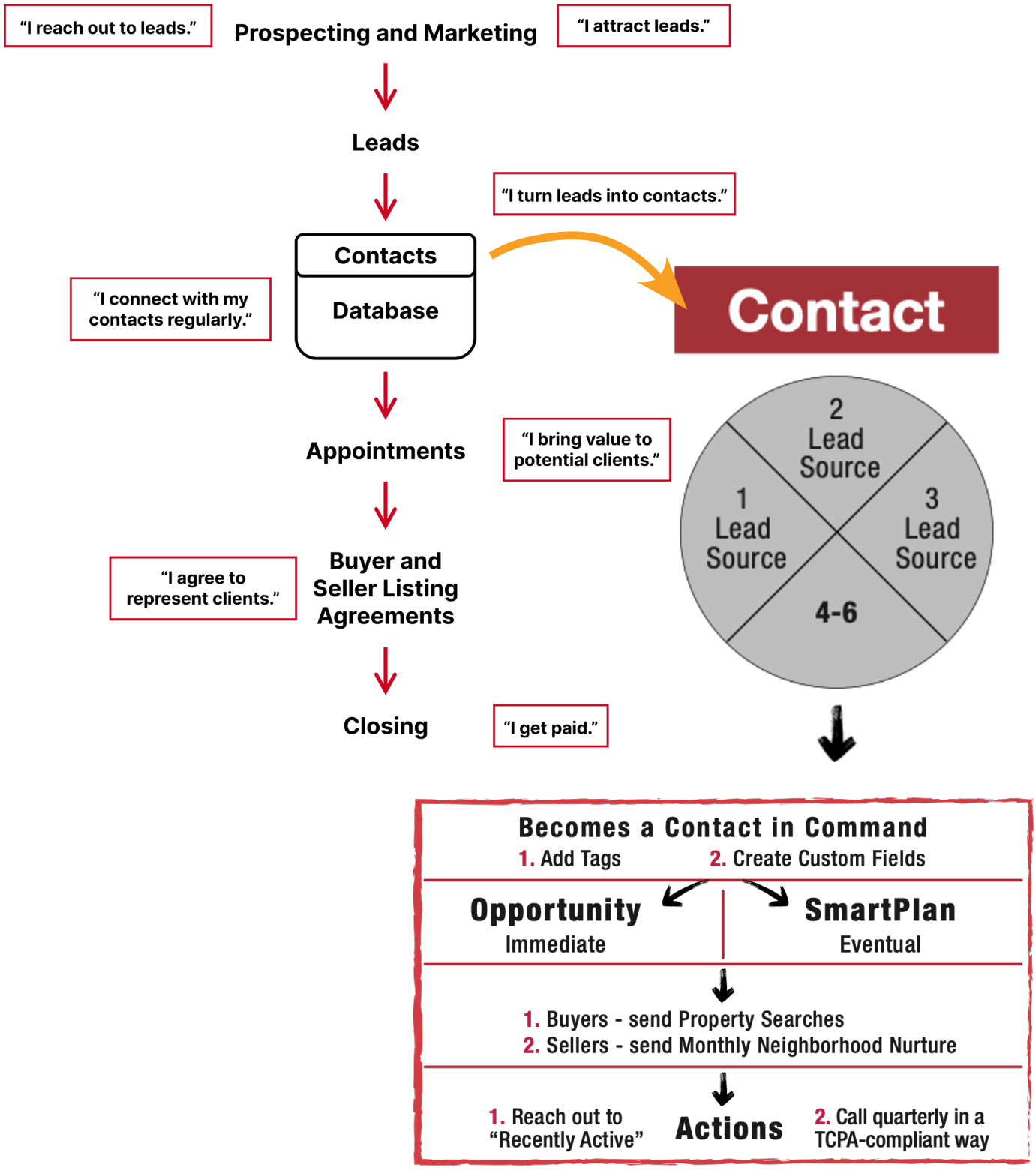
The Way Through Fear Is Action

– Gary Keller

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Skill Builder: Lead Follow-Up



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Life Has Big Events and Moves

87% ***of Sellers said they would use their agent again and refer them to others.***

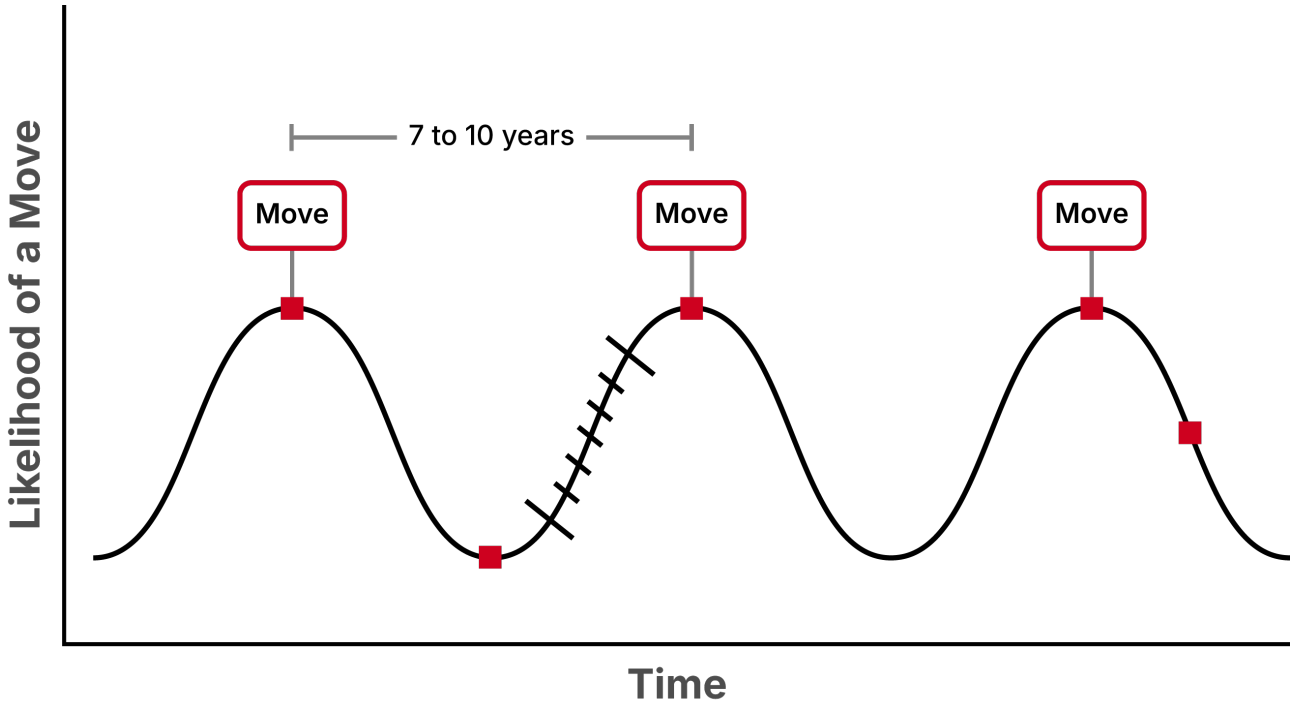
↳ ***BUT only 29% of Sellers used an agent they had used previously.***

91% ***of Buyers said they would use their agent again and refer them to others.***

↳ ***BUT only 15% of Buyers used an agent they had used previously.***

National Association of REALTORS®, 2025 Profile of Home Buyers and Sellers

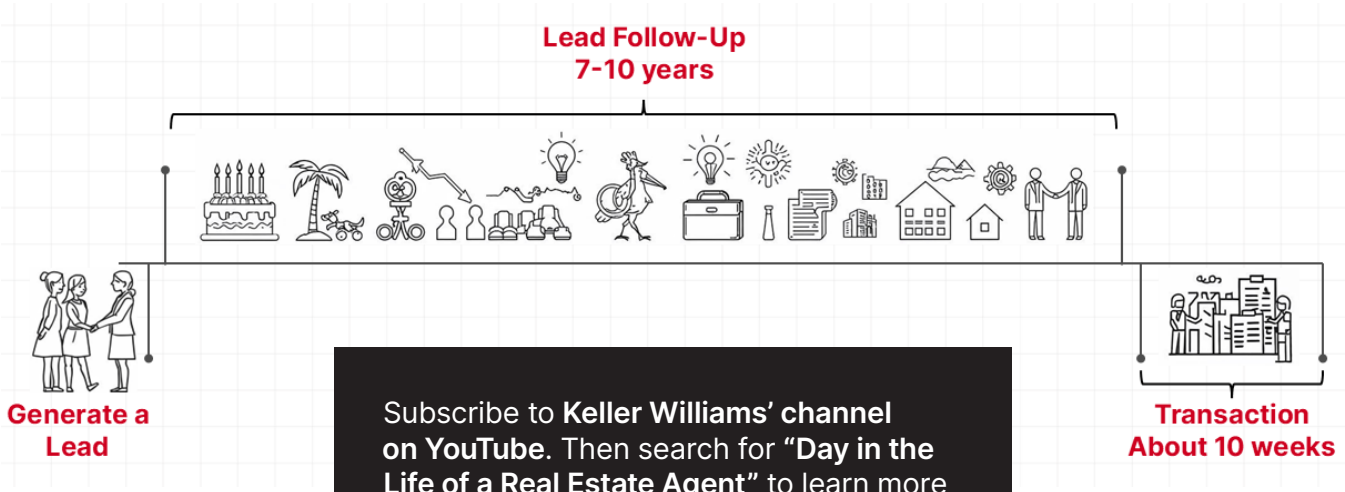
The average homeowner stays in their home for 7–10 years. When they are ready to move, it can represent an opportunity to both buy and sell.



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The Life of a Lead



Subscribe to **Keller Williams' channel on YouTube**. Then search for **"Day in the Life of a Real Estate Agent"** to learn more about how lead generation, lead follow-up, and transactions work, and how they help you structure your day as an agent.

Agent Success Story

With over 30 years of experience in the real estate industry, **Gene Arant** runs a $100 million real estate business. His advice for this level of success? Quit trying to make it complicated. He learned in BOLD® that he needed to have 20 conversations a day. That's it.

He goes deeper to add that those conversations should be meaningful and they should come from contribution. Coming from contribution simply means shifting the focus entirely to helping others—whether it's answering real estate questions, offering advice on home improvements, or guiding them through the buying and selling process. Gene says if you do that, you don't ever have to ask for the business. When Gene's team starts their lead generation for the morning, it's with the directive, "Go help somebody."

At this point in his career, Gene's database is 30,000 strong. With so many people, there's no way to just remember to reach out to everyone with value and consistency. Everyone in the team's database is on a touch plan and, unless they ask to be taken off, they are contacted consistently and with value. Follow-up is so important that if a team member has more than 10 undone/overdue tasks—they no longer receive leads from the team. Following up is the business, so be sure you're honoring your lead generation and lead follow-up time so you can build a database and business as large as you want.

Listen to Gene's story on the MREA **Podcast #72** at millionaireagentpodcast.com and see if BOLD® is being taught near you by talking to your Market Center or searching BOLD® Locations on Connect.

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How to Stay in Touch with Your Database

A CRM (Customer Relationship Management) system isn't just a tool—it's a game-changer for building a repeatable, scalable real estate business.

Stay Organized

You'll never forget who to follow up with, what you last talked about, or when a lead is ready.

Without a CRM, sticky notes, scattered spreadsheets, and mental to-do lists = missed opportunities.

Follow-Up Becomes Systematic

CRMs let you schedule follow-up reminders and automate check-ins, and categorize leads (hot or warm) so you always know where people are in the process.

The fortune is in the follow-up.

Nurture Relationships Long-Term

Most buyers and sellers aren't ready the moment you meet them. A CRM helps you keep in touch with market updates, home anniversary notes, or simple check-ins so when they are ready, they think of you.

Increase Referrals

By keeping your SOI and past clients engaged through your CRM, you're more likely to get repeat and referral business because they won't forget you exist.

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Importance of Staying in Touch with Your Database

Agent Success Story

Richard Schulman found his way into a career as a real estate agent after growing tired of working as a professional house painter. Right away, he learned that he needed to treat it like a real job, and he found the best and most cost-effective lead generation method for him. As a $116M+ per year producer, he attributes his success to creating a database and following up with it.

Richard's database provides him with a daily list of who to call, email, or text. He makes sure he has appropriate consent before calling or texting anyone so that he stays TCPA-compliant. He also removes anyone who asks not to be contacted. Most of his contacts never leave his database. He illustrates this with the story of a client he represented 15 years ago. For the next 15 years, he consistently reached out via email, calls, and texts, receiving fewer than three responses. Eventually, the client emailed him, ready to sell his house. Richard sees this 15-year journey as the perfect example of his model: to follow up forever.

Richard advises that a database should start with one's sphere of influence and that it's a huge mistake to exclude anyone based on assumptions. He believes agents wrongly assume some people can't afford a home, when in his experience, many who he thought couldn't, eventually do. Since nearly everyone wants to own real estate, everyone should be in the database.

In his 21 years in the business, Richard states that he has never made a sales call. Instead of selling, he focuses on offering value, which leads to people asking him to help them buy or sell a house. His strategy is to remain consistently in front of his contacts, because the moment they decide to enter the market is always unpredictable. Forever follow-up equals a forever business—one that can support you and your family. Be consistent and get the right now and the later business that will sustain you.

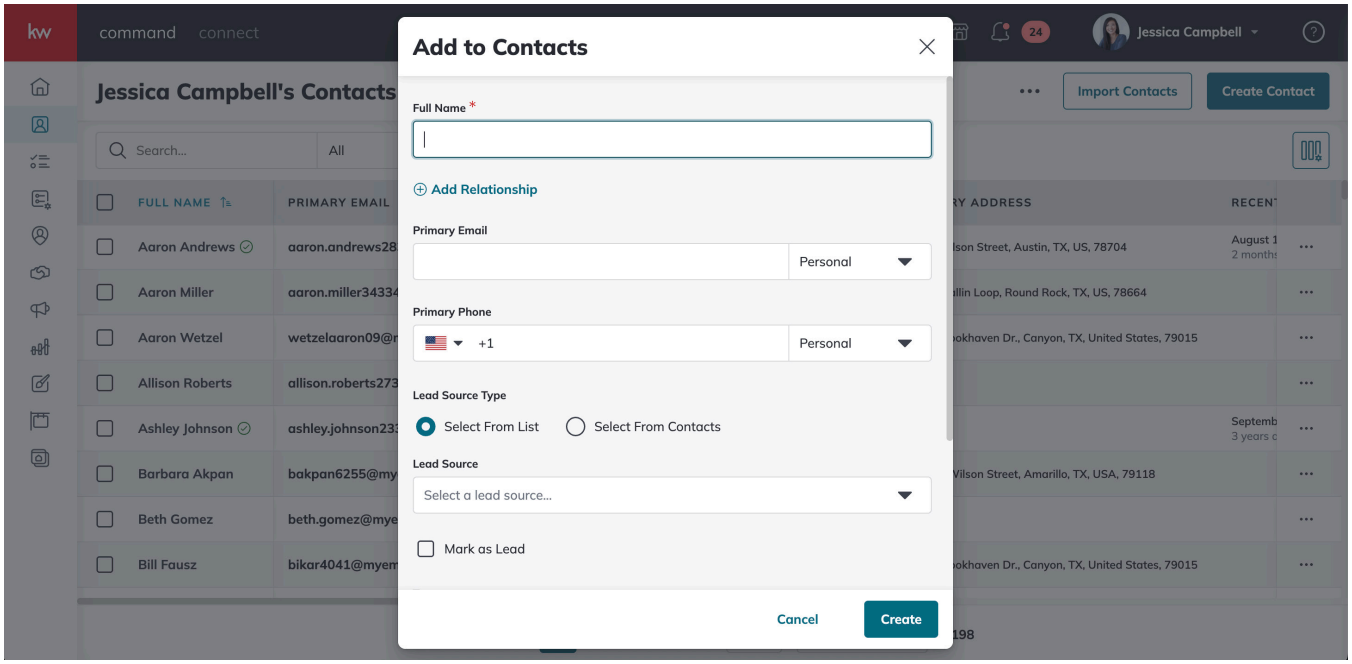
Subscribe to millionaireagentpodcast.com and listen to episode 53 for Richard Schulman's system. You'll have access to one-page summaries on all the systems you learn about.

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Activity: Add Contacts in Command®

1. In this activity, you will add five contacts to Command®, including all the information you have for each one.
2. Choose contacts for whom you know their birthday.
3. You can add them using your computer or phone.
4. To add using your computer, go to kw.answers.com and search “Add a Contact to Command”. To use your phone, search “Add a Contact in the Command App”.



Adding one contact is great, and there are import options where you can upload more than one contact at a time.

Go to **answers.kw.com** and search **“Import Phone Contacts into Command Using the Command App”** and **“Import Contacts into Command”.**

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Tags, Touches, Tasks, and SmartPlans

Touches, Tags, Tasks, and SmartPlans are ways to leverage technology to keep you top-of-mind with your database. These will include, but are not limited to, emails, TCPA-compliant text messages, reports, reminders, announcements, TCPA-compliant calls, invitations, and much more.

1. **Tags** allow you to easily search your database to pull up a specific segment of people in order to communicate directly to them with information that brings value to their lives.

2. **Touches** are any interaction or communication a real estate agent has with a potential or existing client.

3. **Tasks** are specific, actionable items that need to be completed in the real estate process.

4. **SmartPlans** are a coordinated series of marketing and communication activities designed to achieve a specific goal.

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Tag Your Database

- Tags allow you to easily search your database to pull up a specific segment of people in order to communicate directly to them with information that brings value to their lives.
- Every tag is a filter for action, strategy, and relationship-building.
- Never add a tag if you don't know what you are going to do with that tag.
- Tags are used to segment people based on how often you'll communicate and what you want to communicate with them.

Common Database Tags

1. **Sphere**: This includes people who know you, like you, and want you to succeed.
2. **VIP**: People who are most likely to refer you to customers and with whom you want to stay in deep relationships.
3. **Past Clients**: People you have helped buy, sell, or lease real estate.
4. **Referrals**: Someone who was referred to you.
5. **Leads:** These are people you have had one-way communication with (maybe you've left a door hanger or called, but you have not yet spoken with them).
6. **Agent**: These are people you meet at real estate events and/or agents who have referred or might refer to your business.
7. **Vendor**: Track vendors by specific services such as "Inspector" or "Lender".
8. **Do Not Call**: Anyone on any do-not-call list and anyone who has told you not to call or contact them again.
9. **Missing Information**: People for whom you still want to collect more information so you can stay in meaningful contact with them.

Other Tags

Brainstorm a few other tag examples you may use. Add a rationale for why this is an important tag in your database. Remember, all tags need a purpose. Every tag is a filter for action, strategy, and relationship-building.

Tag	Rationale

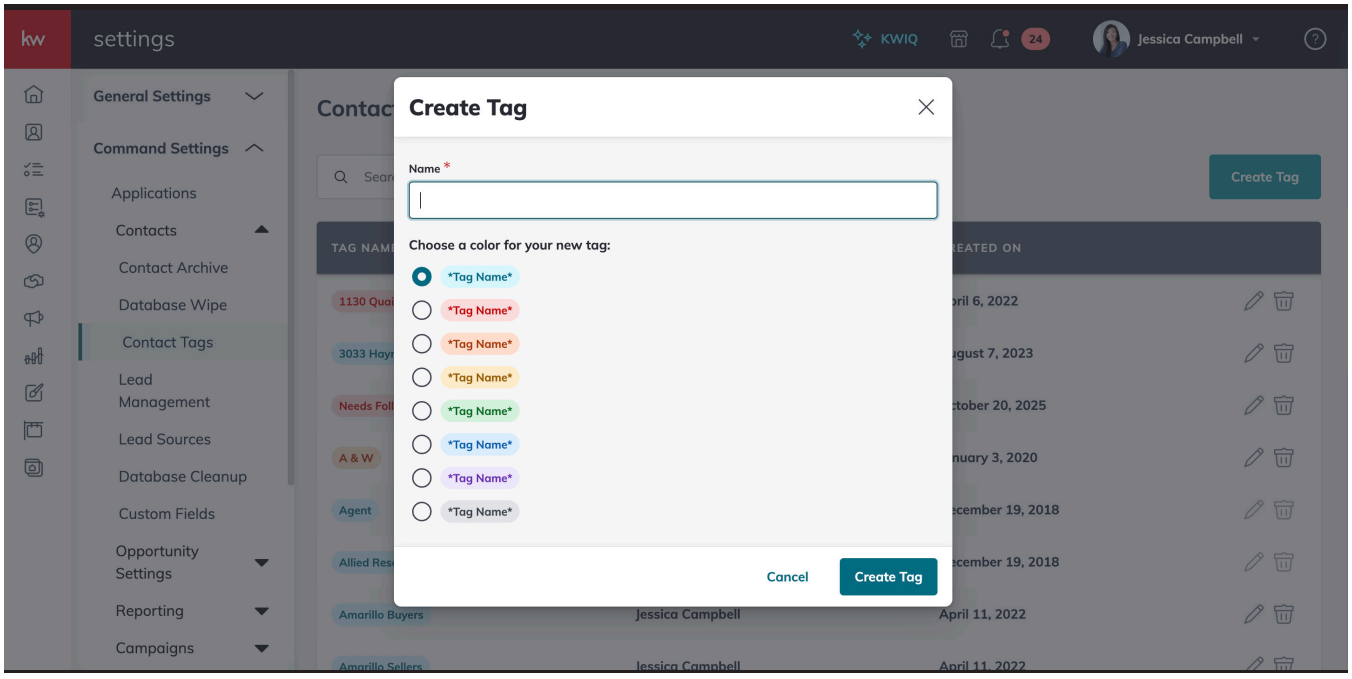
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Activity: Add Tags to Command

Command® comes preloaded with several tags. However, you will likely want to add some of your own and may want to delete some that are in the system now.

Go to kw.answers.com and search for the article “Create/Edit/Delete Tags in Command Settings”. Though you likely won’t use it today, it’s very important to have a “Do Not Call” tag in your database so you are able to clearly mark anyone who does not want you to reach out to them again. So we will add that tag to our database now.



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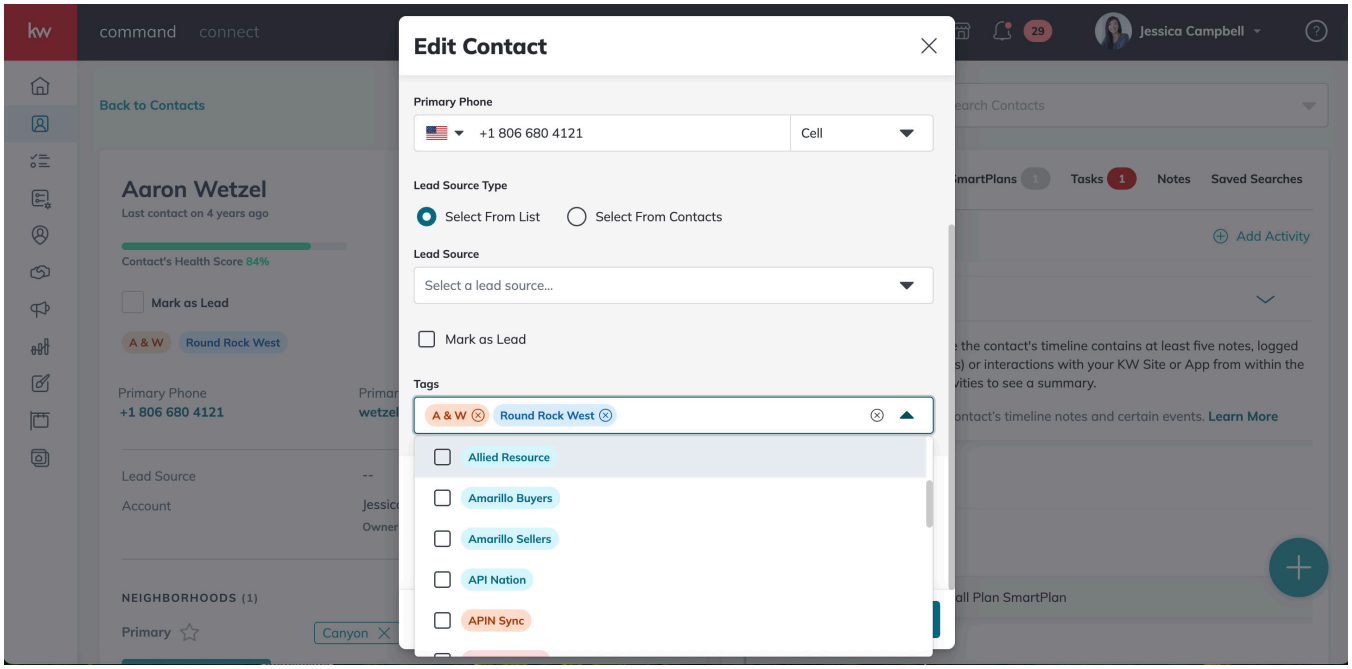
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Activity: Add Tags to Contacts

Let’s go back to your contacts in Command® and add at least the “Sphere” tag to those you entered today.

Go to kw.answers.com and search “Add or Remove Contact Tags”.

Make any notes here for things you want to research about each person or thoughts on tags you may want to consider.



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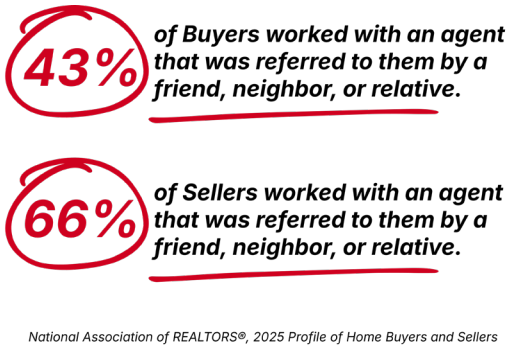
Touches

- Touches are any interaction or communication a real estate agent has with a potential or existing client.
- Examples of touches are sending emails, making TCPA-compliant phone calls, sending direct mail, engaging on social media, or meeting in person.
- The aim of touches is to build relationships and keep mindshare with your database.
- Touches should be needed and relevant.

Needed and Relevant	Unneeded and Irrelevant
Here's my preferred vendor list.	Reminder of the time change this weekend.



National Association of REALTORS®, 2025 Profile of Home Buyers and Sellers



National Association of REALTORS®, 2025 Profile of Home Buyers and Sellers

Referrals are people with real estate needs who your contacts know, and they make up a large portion of top agents' business.

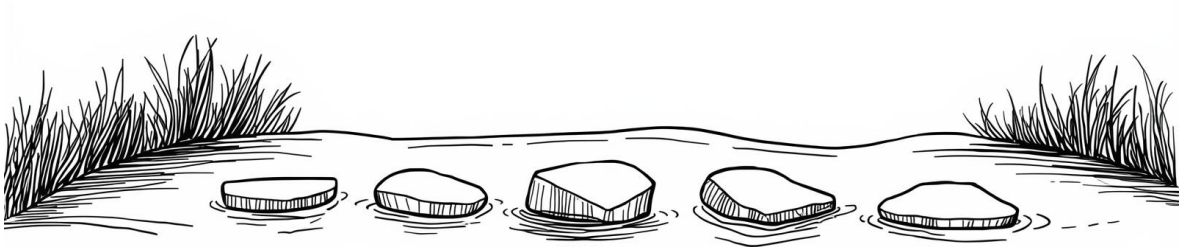
The more mindshare you have with your database and the more value you bring, the more **first-time, repeat, and referral business** you will receive.

Mindshare becomes market share.
We need people first to think of us as their agent, and then we become it.

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Valuable Touches



Build relationships one step at a time.

- All touches should have value to the person you are communicating with.
- Make contact often enough not to be forgotten and with patience and sensitivity.

Create Valuable Touches with AI

Prompt: Reframe Creating a Foundational Touch Plan with AI

→ You're a new real estate agent and you want to build your business by being helpful, not pushy. Your goal is to be the first person your friends and family think of for anything related to real estate. You need a list of at least 30 easy, low-cost touches you can make to everyone you know. Please ensure that at least 3/4 of these touches are completely free, with no more than 1/4 having any cost and that cost being less than $3 per touch. These touches should feel personal and can be done through email, social media, phone calls, or texts. Please create a plan with specific examples for your location and who you want to serve. Use the information below to make the plan personal to you:

1. Your location [e.g., city, state]
2. Your people: [e.g., first-time home buyers, families with young kids, people who like to renovate homes]
3. Your personality: [e.g., friendly and approachable, knowledgeable and professional, fun and energetic]
4. Your favorite ways to communicate: [e.g., quick texts and calls, social media posts, writing long emails)
5. Important things happening in your city: [e.g., an annual festival, local sports team events]

The goal is to build relationships now so that when people need a real estate agent in the future, they already know and trust you.

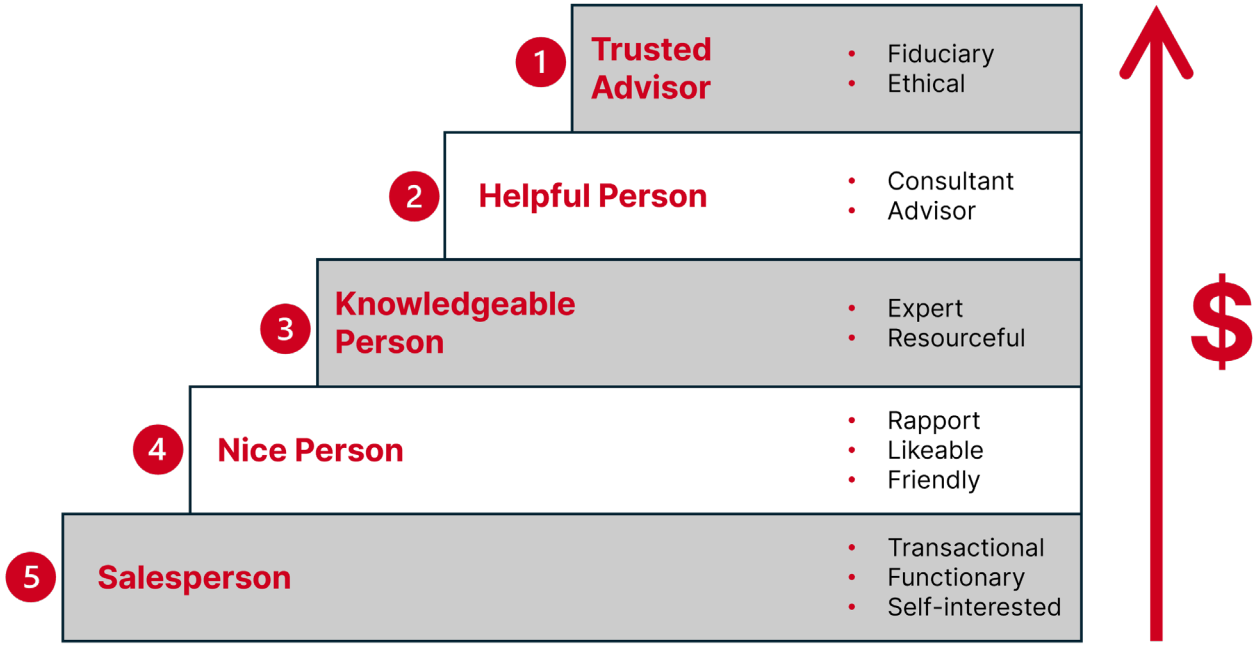
WARNING! Any text or materials generated by artificial intelligence (AI) should be reviewed for accuracy and reliability as there may be errors, omissions, or inaccuracies. The use of generative AI is subject to limitations, including the availability and quality of the training data used to train the AI model used. Users should exercise caution and independently verify any information or output generated by the AI system utilized and should apply their own judgment and critical thinking when interpreting and utilizing the outputs of generative AI.

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The Staircase of Perceived Value

By connecting with people consistently through valuable and needed touches, you move yourself up the Staircase of Perceived Value and people want to work with you and are willing to pay you well for the high-level of service you provide.



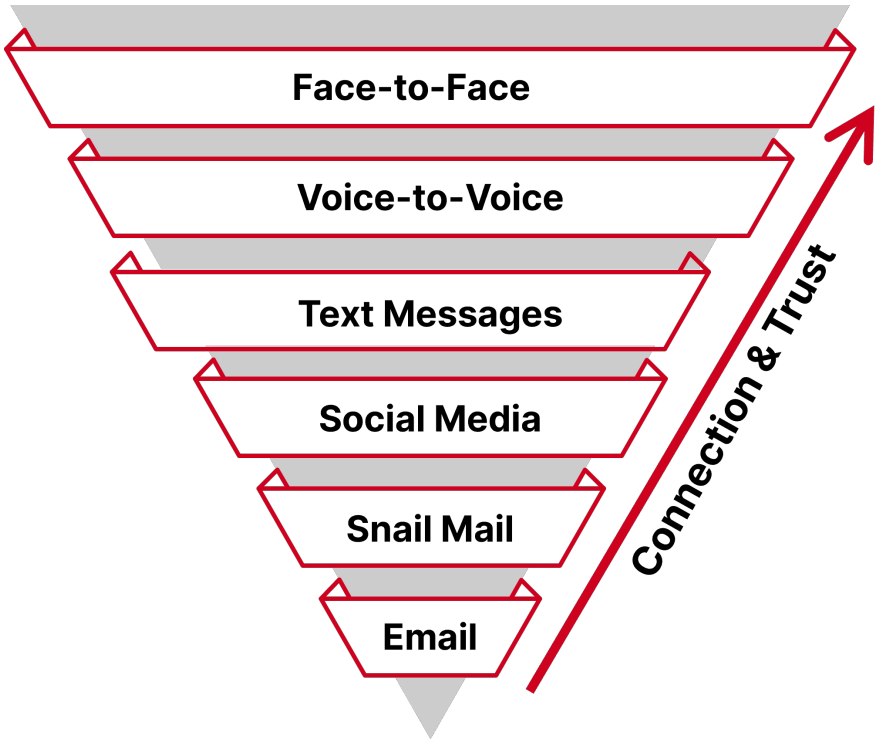
Understand that as you move up the staircase, you take all the positives of each stair with you. For example, a knowledgeable person also runs the transaction with ease and is likable. A trusted advisor is nice, knowledgeable, and helpful, as well as being a fiduciary. The higher you are on this staircase, the greater the value you bring to potential clients.

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Communication Strengthens Relationships

Not all communication methods build trust or strengthen relationships equally. The more human and interactive the method, the more powerful it is for generating connection and relationships. Trust is the key to effective lead generation and client service. Consistency in being face-to-face and voice-to-voice will yield the most business and income.



Use lower levels of communication for reach and visibility, but prioritize higher levels for meaningful follow-up and conversion. Strong agents move toward human, trust-building conversations that lead to deeper relationships and action.

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Communication Strengthens Relationships

1. **Face-to-Face (Most Trust-Building)** In-person communication is the most powerful tool for building lasting trust. Body language, eye contact, and shared experiences establish emotional connection, credibility, and commitment. Use face-to-face moments whenever possible to deepen new relationships.

2. **Voice-to-Voice** (Phone or Video Call) Speaking with someone adds emotion, inflection, and human connection that text-based channels can't deliver. A live conversation builds rapport quickly, allows for two-way dialogue, and helps establish you as a trusted professional.

3. **Text Messages** Texting is fast, direct, and feels more personal than email. It creates space for short, relevant touch points that encourage response. Because it's conversational and convenient, it's a strong way to nurture early interest and stay top-of-mind. However, tone can be misread. Therefore, be cautious with humor, directness, and sarcasm.

4. **Social Media** Social media helps build brand awareness and allows prospects to get to know your personality, expertise, and values. It builds connection at scale with visibility, but not depth. It's excellent for top-of-funnel lead generation, but rarely builds trust on its own. However, videos that give insight into your personality can do more to connect others to you.

5. **Snail Mail** Traditional mail feels more personal because it's tangible and shows effort, especially in a digital age. However, since it's still one-way and delayed, it doesn't allow for quick interaction. It can be a useful tool to make a first impression or spark interest in your brand. Hand-written mail is especially impactful and might even move snail mail up the pyramid in terms of its potential for relationship-building.

6. **Email (Least Trust-Building)** Email is useful for delivering information to many people at once. It's efficient and low effort, but it tends to feel impersonal and is easily ignored in crowded inboxes. While email can support your lead generation, it rarely builds the kind of trust that moves a lead closer to action.

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Tasks

- Tasks are specific, actionable items that need to be completed in the real estate process.
- Use tasks to ensure timely, TCPA-compliant communication with leads and contacts to stay top-of-mind.
- Tasks systematize follow-up by reminding you what to do and when to do it across your entire business.
- Tasks improve conversion by enabling consistent nurturing.
- Tasks segment your efforts so you can prioritize high-value contacts.
- Tasks reduces your mental load.

Miller's Law

Miller's Law states that the average person can hold seven plus or minus two items in their short-term or working memory at a time. You are going to be keeping up with every member of your database multiple times a year while juggling clients, marketing, and much more. No one can remember it all.



What tasks might you want to add?

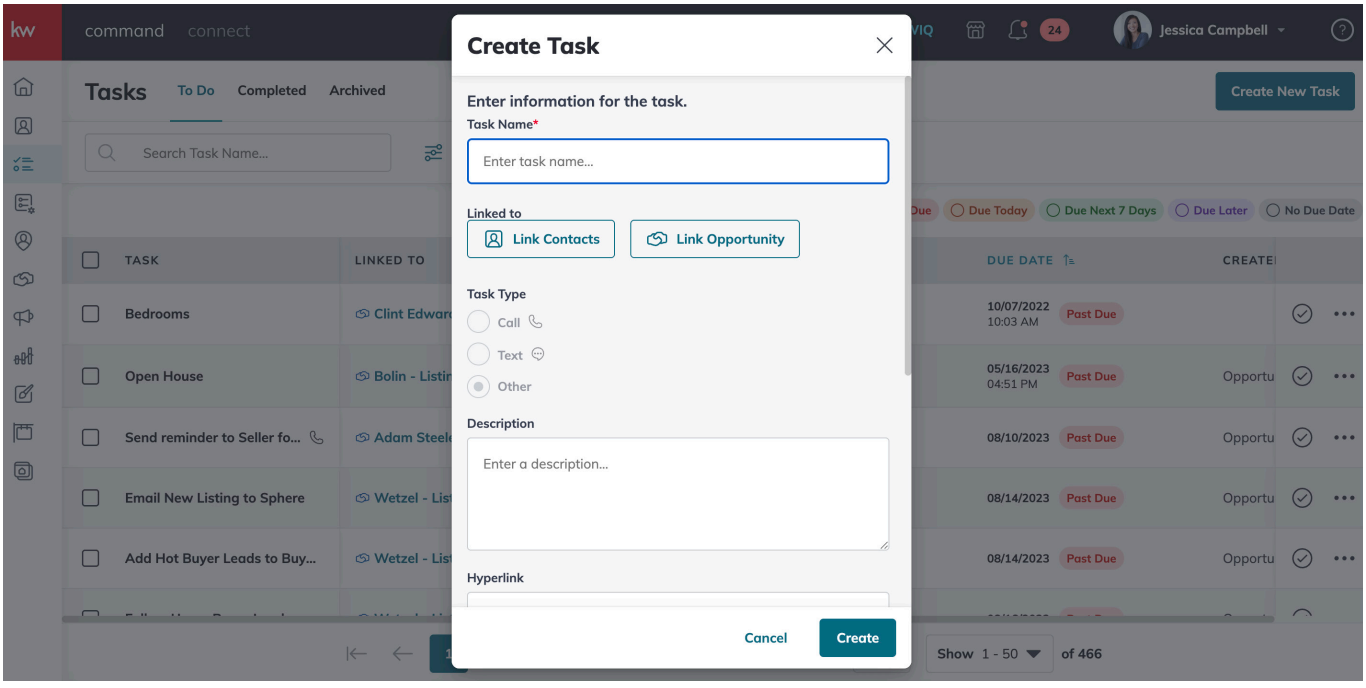
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Activity: Add a Task in Command®

Take time to add a birthday call task to one or more of the contacts you added to Command®.

Go to answers.kw.com and search “Create Tasks in Command” to add with your computer or search “Create Tasks Using the Command App” to use your phone.



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SmartPlans

- SmartPlans are a time-saving leverage to ensure that the agent stays in touch, provides value, and has mindshare for those in their database.
- SmartPlans are a coordinated series of marketing and communication activities designed to achieve a specific goal.
- Built around a sequence of touches and tasks, SmartPlans can go so far as to automate sending emails and more.
- Drip email campaigns to nurture leads, postcard mailings to target neighborhoods, or social media campaigns to promote open houses can all be accomplished with SmartPlans.

	Task	SmartPlan
Definition	1. A single, specific action or reminder that you create to manage your daily activities. 2. Can be associated with contacts, opportunities, or remain unlinked. 3. Can include details like descriptions, due dates, priority levels, and hyperlinks. 4. Manually created and completed, and they do not have automated sequences or triggers.	1. An automated workflow designed to manage multiple steps over time. 2. Can include actions like reminders for calls, sending automated communications, or adding contacts to other SmartPlans. 3. Can be customized, scheduled, and set to repeat. 4. Allow for triggers like auto-enrollment based on tags. 5. Designed for automation and scalability. 6. Ideal for managing ongoing communication and follow-ups.
Example	Follow-up with Jose to set a time to meet his contractor.	Home Anniversary SmartPlan.

Frequently Used Command® SmartPlans:

1. Home Anniversary
2. Long-Term Nurture
3. 8×8
4. Promote My App

There are nearly 4,000 top-rated SmartPlans available in **Command®.** Many were made by agents and Market Center leadership and are shared by their creators with all Keller Williams® agents.

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The Breakthrough 120 SmartPlan

Quarterly Calls

One of your most important touches for everyone in your database that build trusts and keeps you top-of-mind as a real estate agent.

1. Contacts – may not be ready to buy or sell, but they can refer others if you stay in touch. You're staying top-of-mind and reminding them you're in real estate without being pushy.
2. Past Clients – whether you helped them buy, sell, or rent—stay connected. Touch base on how they're enjoying their home and offer market updates or resources.
3. Warm Leads – anyone who said "maybe", "not now," or "call me in a few months". Add them to a 90-day follow-up rotation to stay relevant. People's lives and plans change quickly—quarterly TCPA-compliant calls catch when there is a change of plans.
4. Referral Partners – other agents, mortgage lenders, title reps, attorneys, insurance agents, etc., anyone who can send you business or serve your clients. Remember that relationships are a two-way street.

Bi-Weekly Neighborhood Nurture

Something for everyone.

1. The Bi-Weekly Neighborhood Nurture can give contacts information on their current and/or goal neighborhood every two weeks.
2. This is an automated email.
3. It sends information about neighborhood market trends, statistics, and recent sales.

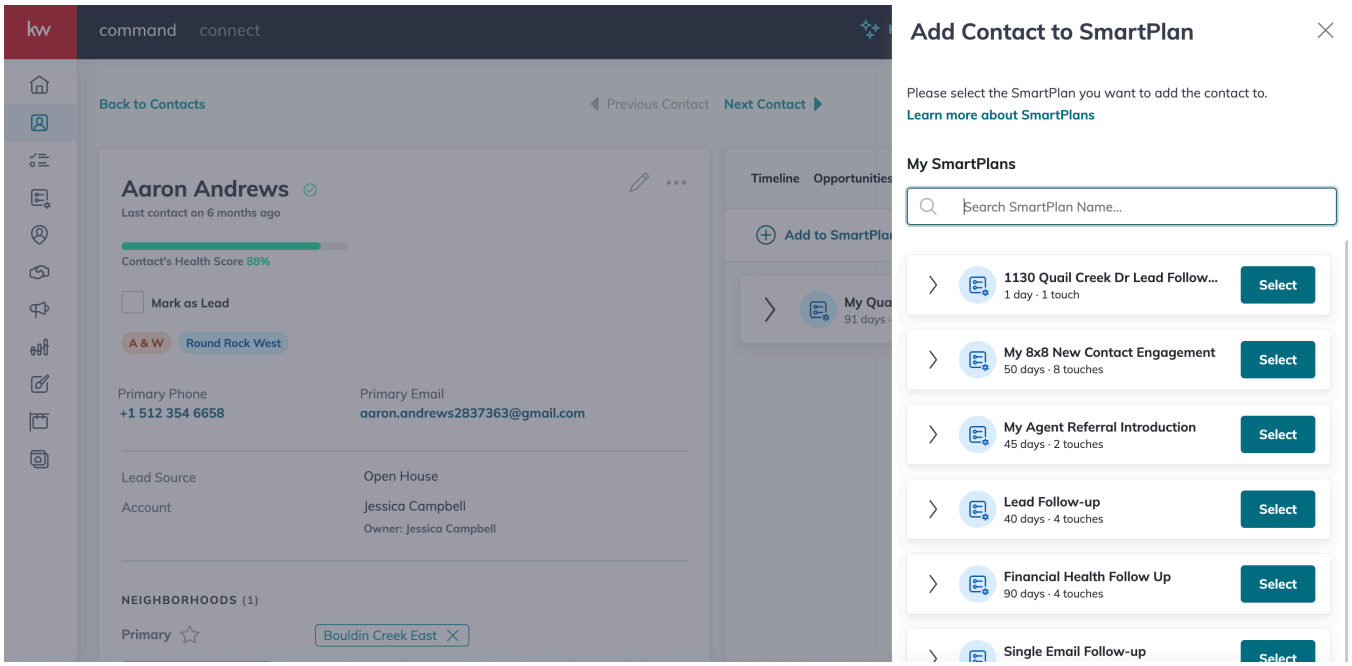
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Activity: Test Drive the Breakthrough 120 SmartPlan

Add yourself to the Breakthrough 120 SmartPlan.

Go to answers.kw.com and search “Add Contacts to a SmartPlan” to add with your computer or search “Create Tasks Using the Command App” to use your phone.



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Activity: Make TCPA-Compliant Calls to Set Up the Neighborhood Nurture

Put yourself on a Neighborhood Nurture. Start calling (in a TCPA-compliant way) each person that you added to Command today.

Neighborhood Nurture Dialogue:

Exchange pleasantries and use the FORD framework to get into a meaningful conversation. At a logical point in the conversation, mention that you're in real estate and have a great tool you'd like to give them access to.

Would you like to know what's selling in your neighborhood just to keep an eye on the area? How about I add you to a monthly email I call the Neighborhood Nurture? It will let you know what's come up and sold in your area over the last month in one simple email.

(If yes)

If you have their address, confirm it.

(If you don't have their address)

I just need your address so I can send you the correct information.

I'm excited to keep you up-to-date on the market. If there's ever anything I can do to help you, or if you hear of someone else interested in real estate, you'll let me know, right?

(If no)

I understand. Is there anything else in the real estate realm I can help you with?

(If yes)

Follow through on this conversation to see if you can get them what they need.

If they don't answer, leave a live voicemail and send a text.

"Hello _____. This is [your name]. I hope you're doing great. Give me a call back when you get a chance!"

Text message example: "Hi _____! I hope you're doing great. I'd love to catch up when you have a chance."

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

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Neighborhood Nurture Dialogue Reflection

WARNING! You must comply with the TCPA and any other federal, state, or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

FORD and Neighborhood Nurture Dialogue Reflection

How many two-way conversations did you have? _____

Did you discover anything relevant to their current or future real estate needs?

What felt like a win in your conversations?

What challenges did you face?

Aha's

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Holidays

January	February	March
Jan 1: New Year's Day Jan 4: Natl Trivia Day Jan 19: Natl Popcorn Day Third Mon: MLK Day Jan 21: Natl Hug Day Jan 24: Natl Compliment Day Last Fri: Natl Fun at Work Day	Feb 2: Groundhog Day Feb 9: Natl Pizza Day Feb 14: Valentine's Day Feb 17: Random Acts of Kindness Day Feb 20: Love Your Pet Day Varies: Fat Tuesday	First Friday: Employee Appreciation Day Mar 8: International Women's Day Mar 14: Pi Day Mar 17: St. Patrick's Day Around Mar 20: First Day of Spring Mar 23: Natl Puppy Day
April	**May**	**June**
Apr 1: April Fools' Day First Wed: Natl Walking Day Apr 10: Natl Siblings Day Apr 11: Natl Pet Day Apr 22: Earth Day Last Wed: Administrative Professionals Day Last Fri: Arbor Day	May 1: May Day May 5: Cinco de Mayo First Tue: Teacher Appreciation Day Second Sun: Mother's Day Third Fri: Bike to Work Day Fri before Memorial: Natl Road Trip Day Last Mon: Memorial Day	Jun 8: Best Friends Day Jun 14: Flag Day Third Sun: Father's Day Jun 19: Juneteenth Around Jun 20: Summer Solstice Jun 21: Selfie Day Jun 27: Sunglasses Day
July	**August**	**September**
Jul 4: Independence Day Jul 6: Fried Chicken Day Third Sun: Ice Cream Day Jul 21: Junk Food Day Last Thu: Intern Day Jul 29: Lipstick Day	Aug 1: Natl Girlfriends Day Aug 8: International Cat Day Aug 10: Natl Lazy Day Aug 13: Left-Handers Day Aug 16: Tell a Joke Day Aug 21: Senior Citizens Day Aug 26: Women's Equality Day	First Mon: Labor Day Sun after Labor Day: Grandparents Day Sep 16: Working Parents Day Sep 22/23: Autumn Equinox Sep 29: Coffee Day
October	**November**	**December**
Oct 5: World Teacher's Day Fourth Sat: Make a Difference Day Oct 31: Halloween	Nov 11: Veterans Day Third Tue: Entrepreneurs' Day Fourth Thu: Thanksgiving Fri after Thanksgiving: Black Friday Sat after Thanksgiving: Small Business Saturday Tue after Thanksgiving: Giving Tuesday	Dec 4: Natl Cookie Day Dec 8: Natl Brownie Day Third Fri: Ugly Sweater Day Dec 21 or 22: Winter Solstice Dec 26: Thank You Note Day Last workday: No Interruptions Day

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Activity: Set Up Your Holiday Task

Choose your two holidays:

1. Roughly six months apart from each other.
2. Choose holidays that work for you.
3. Set up your task to remind you to start the plan 30 days before your holiday.

Holiday	Holiday Date	SmartPlan Date
Selfie Day	June 21	May 21

Set up your reminder for each holiday by inserting the task "Set up [Name of Holiday] SmartPlan" thirty days prior to the holiday.

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Habit Builder: Time Block for Follow-Up in Your CRM

Build a daily habit of adding touches, tasks, and SmartPlans to contacts in your database.

New tags and tasks should be added during or immediately after your lead generation time block. And don't forget to add notes as well.

Applicable SmartPlans should be added as you enter the contact into your database. Every contact should go on the Breakthrough 120 SmartPlan and Holiday Plan. Using these alone, you will be reaching out to your database 34 times a year.

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play 2. Lead generation **w/ tags, tasks, notes, and SmartPlans** 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play 2. Lead generation **w/ tags, tasks, notes, and SmartPlans** 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play 2. Lead generation **w/ tags, tasks, notes, and SmartPlans** 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play 2. Lead generation **w/ tags, tasks, notes, and SmartPlans** 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play 2. Lead generation **w/ tags, tasks, notes, and SmartPlans** 3. Lead follow-up
Afternoon	Listen to the MREA and ONE Thing Podcasts				
Evening					

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Closing

Aha's

Learning Application

1. Add your custom tags to Command®.
2. Go back to your database spreadsheet to:
   - 2.1 Add them to Command®
   - 2.2 Add tags
   - 2.3 Put them on the Breakthrough 120 SmartPlan
3. Time block your lead generation, lead follow-up, and role-play in your calendar for the next month.
4. Continue reaching out to the people who know, like, and trust you until you have had at least 10 real estate conversations.
5. Be sure all contacts you reached out to today are in Command®—even if you didn't get to speak with them. Add tags, tasks, and SmartPlans to each contact. Make sure you have proper consent if your SmartPlans will include calls or texts.
6. Be ready to share your progress report at the beginning of our next session.
7. Every session, we will share our lead generation progress. You'll report:
   - 7.1 Number of contacts you added to your database
   - 7.2 Number of TCPA-compliant calls you made
   - 7.3 Number of real estate conversations you had
   - 7.4 Real estate follow-up opportunities
   - 7.5 Challenges
   - 7.6 Aha's

Go to **answers.kw.com** and search **"Transfer Contacts/Recruits from Exported Spreadsheet to the Command Import Template"** to learn how to import your entire database spreadsheet to Command® at once.

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