Breakthrough 120

Part One: Session One

The Millionaire Real Estate Agent Database

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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These materials may contain hypothetical examples and exercises meant to illustrate aspects of KW's financial, growth and investment models, including:

- calculation of profit share contributions and distributions;
- 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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Likewise, offers of cooperative compensation are fully negotiable and not required by law or practice. Offers of cooperative compensation must be openly discussed with your client and authorized in writing before they are made or accepted. KW plays no role in agent decisions to offer or accept cooperative compensation and imposes no requirements on agents to offer or accept cooperative compensation.

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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Introduction to Breakthrough 120

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A breakthrough is:

> **Mindset on the front end, accountability on the other, and you've got all the key ingredients of huge success.**
>
> **—Gary Keller**

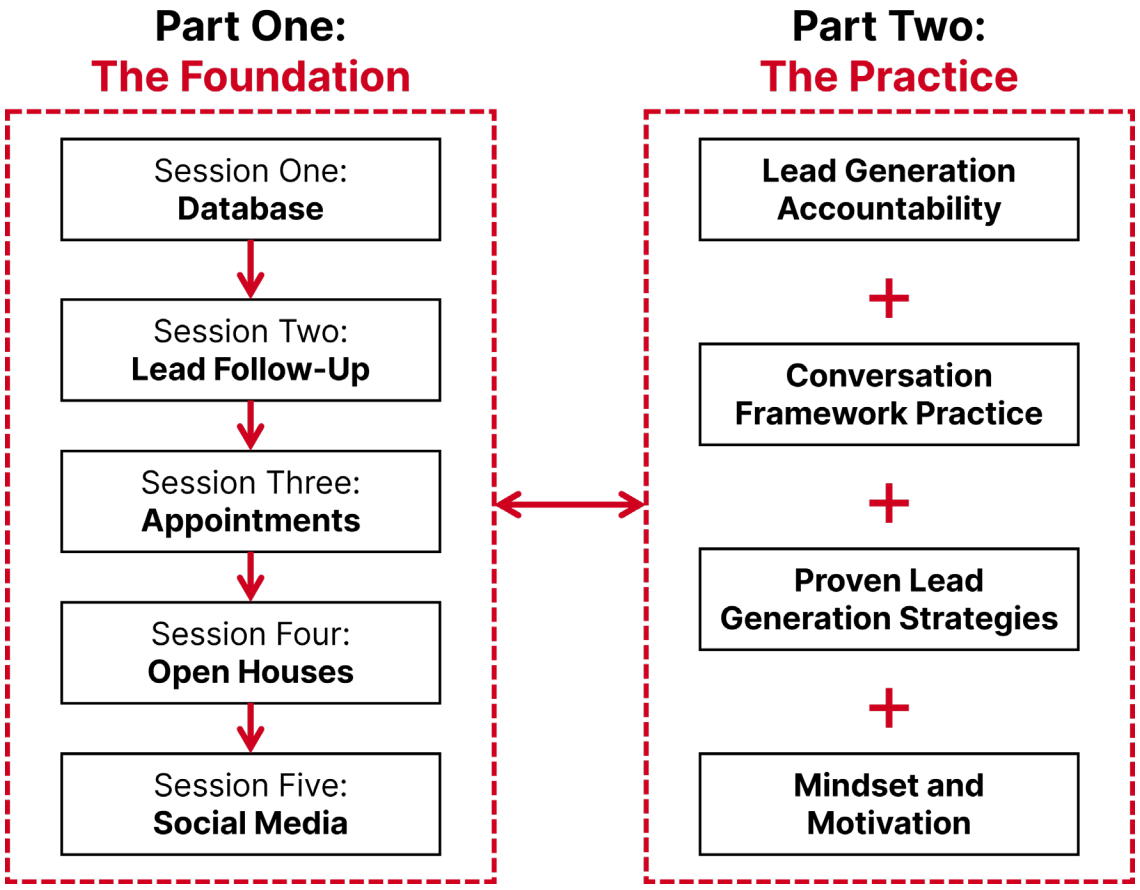
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Your Career Breakthrough

Describe how you envision your life and business a year from now. Think about how much money you would like to make, what activities you will be doing with your family, what skills you will have learned, and what you will be confident in.

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.

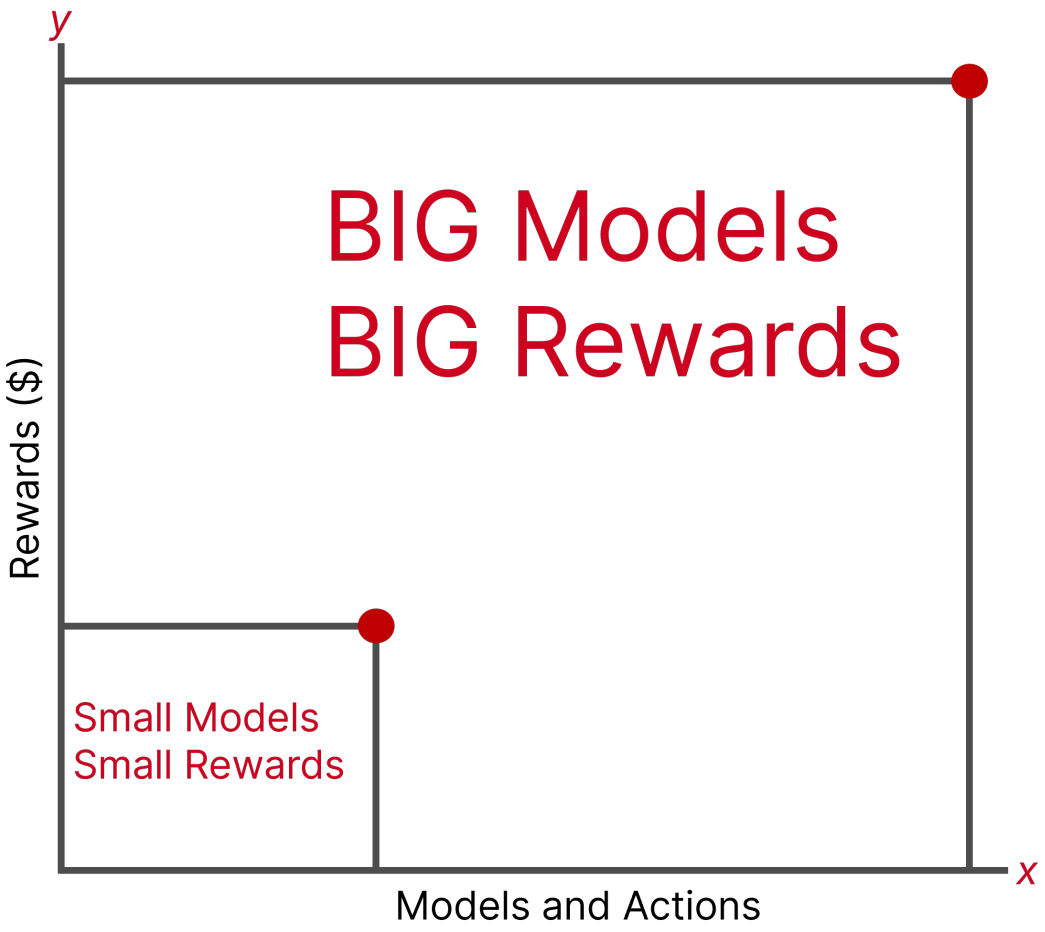


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Success Leaves Clues



Keller Williams® agents and leaders share their models and best practices. **KWIQ**, KW's AI, is available for you to ask questions and get access to all those models and materials. Go to answers.kw.com and search "Use the KW AI Chat (KWIQ) in Command" to learn more.

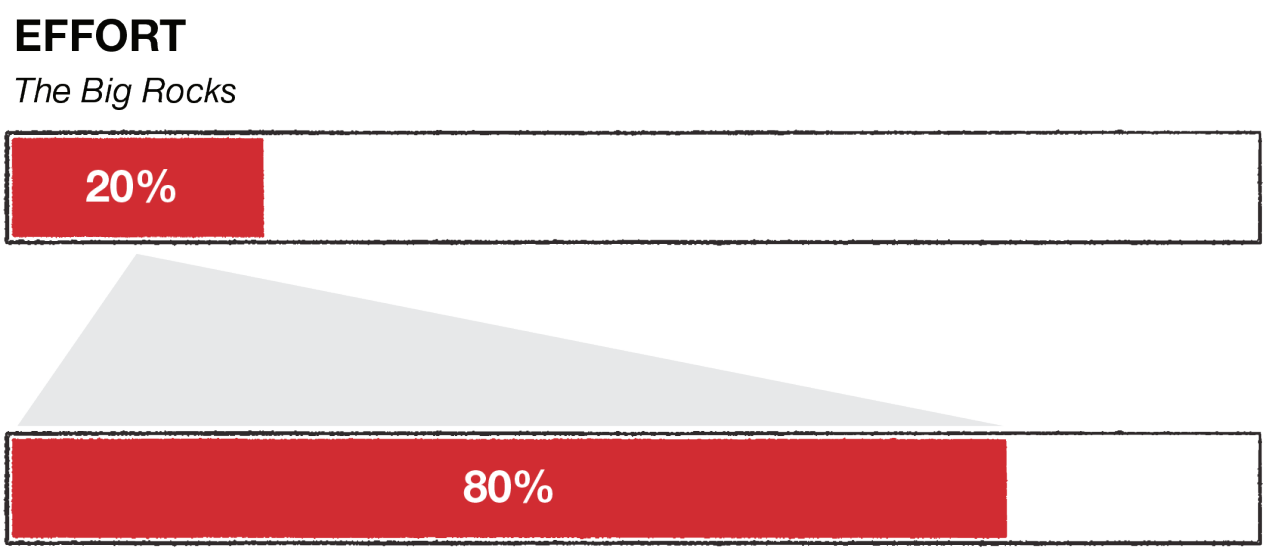
Aha's

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The 80/20 Principle

According to the 80/20 Principle, 80% of the results come from 20% of the effort. Your tasks that fall into the 20% are the ones that have the greatest impact on your business.



Your 20% as a real estate agent is:

The 80/20 principle is the foundation of The ONE Thing book and podcast. Head to the1thing.com/podcast to explore and subscribe to the podcast on your favorite platform. Add it to your calendar and listen every Monday when new episodes drop.

Aha's

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Session One

The Millionaire Real Estate Agent Database

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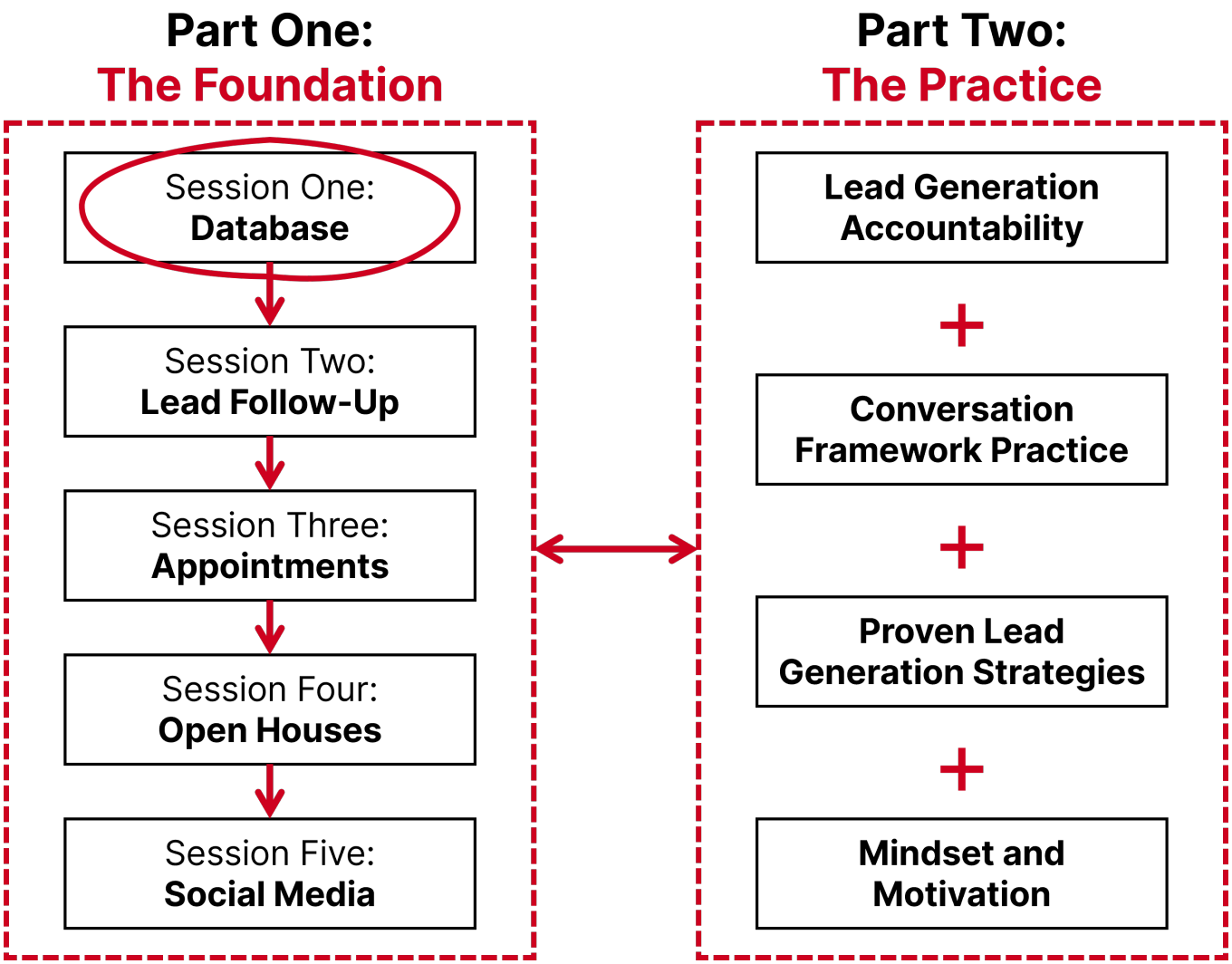
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Session One: Database

Objectives

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

1. Create your database.
2. Expand your sphere of influence.
3. Practice conversations with your sphere of influence through daily role-play.



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Mindset Moment

There are two types of fear:

1. **Rational fear** is based on real circumstances.

   Example: Managing my schedule will be challenging, and I may not have a work-life balance.

2. **Irrational fear** is a fear of something bad happening when we have either no probability or a small chance of that thing happening.

   Example: No one is ever going to want to buy or sell real estate with me.

What are some fears you have regarding your new real estate career?

Scared is what you're feeling. Brave is what you're doing.

—Emma Donoghue

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Categorize Your Fears

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

Common fears about being a real estate agent might include:

1. Fear of not knowing enough to run a successful real estate business.

2. Fear of talking to people about real estate.

3. Fear of not knowing what you're supposed to be doing or how to use your time.

Will you address your fears with avoidance or confrontation?

Aha's

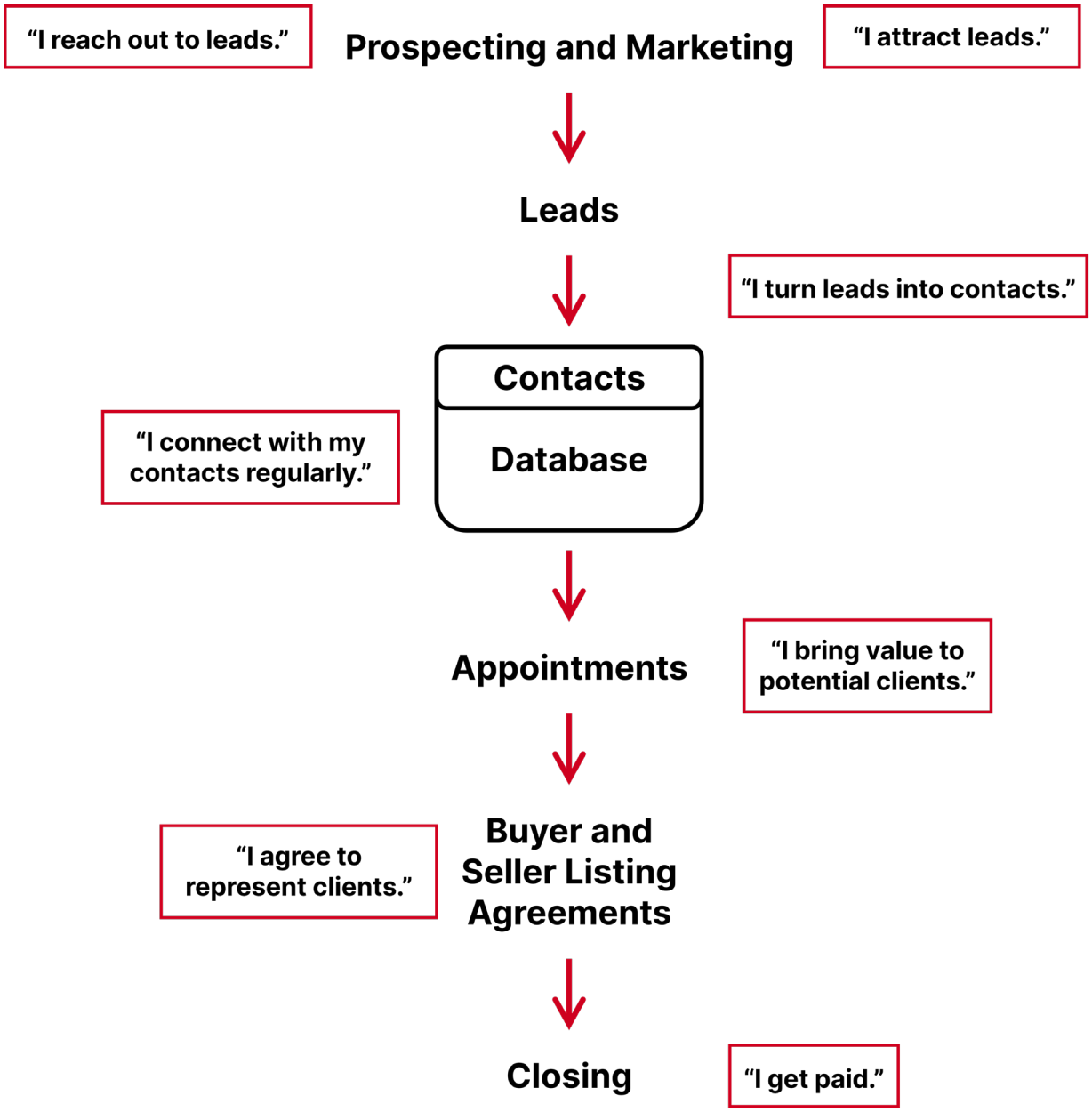
The Way Through Fear Is Action

–Gary Keller

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The Lead Generation Model



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Your Database is Your Business

A database is:

> **Your database is your business. Building up the number of names in it and a relationship with those names is really at the very core of what building a real estate business is all about.**
>
> **—Gary Keller**

Agent Success Story

When **Gary Keller**, founder of Keller Williams, started in real estate, he sold six homes in his first month. Then the market shifted—five months passed without a sale. He was broke.

While he was visiting home, his father questioned if he was even working. Gary proved it by showing his box of contact cards and notes about each person. Impressed, his father loaned him $500. Gary returned to Austin, sold a home, and finished the year as Rookie of the Year.

His comeback wasn't luck—it was his database. Long before CRMs, Gary used a simple box of index cards, tracking every contact, note, and follow-up. He worked it daily and treated it as his most valuable asset.

That little box became the foundation of Keller Williams, now the largest independently owned real estate brokerage in North America. Gary's story proves that a consistently nurtured database will carry you through slow markets, fuel your growth, and build the career you dream of.

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Uncover Your Database's Potential

Why is the database so important to an agent's ability to generate business?

Activity: Your Existing Database

Roughly 6% of the people you know will have a moving experience this year. Multiply the number of contacts in your phone by .06 to get the number of people you already know who will do something in real estate this year that could result in a commission for you if you earn that business.

_____(# of contacts in your phone/database) x .06 =_____(# of people you know who will do something in real estate that could result in a commission)

Multiply that number by the commission you can reasonably expect in your market on a typical sale to get your potential income.

$_____(expected commission) x _____(# of people you know who will do something in real estate this year) = $_____(potential gross commission income)

Is this final dollar amount you calculated (Potential Gross Income) higher or lower that you would have thought?

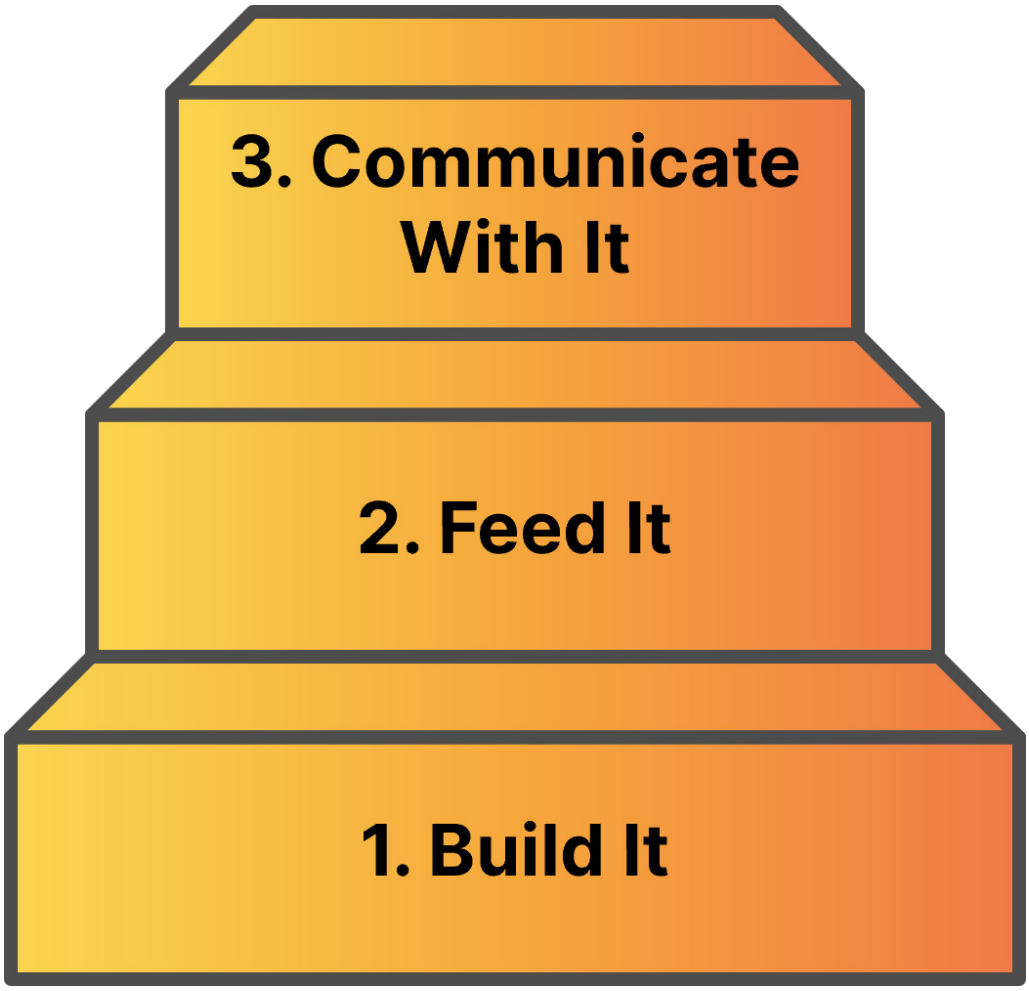
What is your primary database strategy based on the number you calculated? Explain.

Treat your database like it's worth a million dollars and, before long, it will be!

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Build, Feed, and Communicate with Your Database



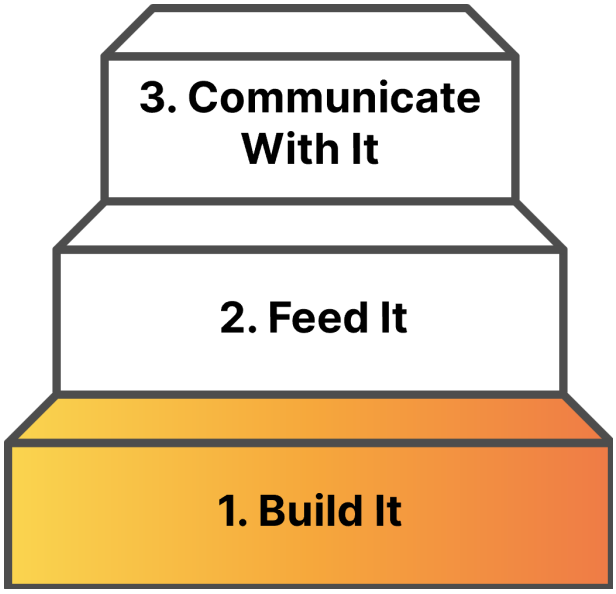
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1. Build Your Database

Build your database by adding the people you already know, those contacts from your phone, and make sure you have basic contact information for all.

A contact is:_____



Simply collect the contact information for all the people you know. This group is the foundation for your millionaire agent database.

At the most basic level, each contact in your database should have:

1. Name
2. Cell phone number
3. Email
4. Address
5. Past record of business (if any)
6. Notes:
   - 6.1 Wants and needs
   - 6.2 Important dates (birthdays, anniversaries, etc.)
   - 6.3 Price point
   - 6.4 Preapproval status
7. Additional information:
   - 7.1 If they own or rent and for how long
   - 7.2 Family members' names
   - 7.3 Interests such as sports or hobbies

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Sphere of Influence

Your Sphere of Influence (SOI):

- The most important group within your database.
- All the people who know, like, and trust you.
- Your biggest source of new, repeat, and referral business.
- They all need to know you're a real estate agent.

My Sphere

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

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Connect with Your SOI

Agent Success Story

After moving from Miami to Dallas to be closer to family, **Jordan Davis** decided she wanted to become a great real estate agent after not being served well by her agent.

She enrolled in BOLD® two months after getting her license, which helped her get a strong start in her business. Although she had no real estate experience, she had close ties with family and friends. She found people who were willing to give her referrals, who had real estate needs or questions, and who were willing to work with her because of what they knew about her and her character. In a brand new city, because Jordan was diligent about lead generation, she sold 17 homes in her first year.

Jordan continued to foster relationships with her sphere of influence. In her second year, she sold 24 homes during her pregnancy with her second child. The growth in her business happened while she was on bed rest for four months before her second child was born. She sold houses by relying on her agent network. As other agents did her showings, she helped them with their paperwork.

One of the people she stayed in touch with consistently was the pastor who officiated her wedding. Though he didn't have any immediate real estate needs when she first connected with him, he called a couple of years later when he did. At the closing table for the sale of his house, he asked if she could help his daughter, who'd recently graduated from college, find a job. His daughter then became an integral member of Jordan's team.

Jordan's story shows us how nurturing relationships can build your business not just by bringing in new and repeat clients, but by building a great team and professional network. Her team now sells over 250 units a year.

Learn about how Jordan's business is built on agent-to-agent referrals and how she nurtures those relationships at real estate events and on social media in episode 48 of the MREA **Podcast**. Subscribe at **millionaireagentpodcast.com** to gain access to her system as a one-pager. Also, talk to your Market Center or look on **Connect** to find your next opportunity to take **BOLD®**.

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Activity: Create Your Database

1. Look at your phone and choose five people who know, like, and trust you. These are going to be the first people you add to your database.
2. Either download the spreadsheet from Connect by searching "Breakthrough 120 Database Spreadsheet" or log into Command® or another database you are already using. Add your five contacts.

Six possible outcomes of your calls:

1. Conversation
2. Real estate conversation
3. Left a live voicemail
4. Texted without reply
5. Got a referral
6. Set a buyer or seller appointment

In the next session, we will start to put our contacts into **Command®**, KW's propriety software that includes a robust database. If you'd like to work ahead, you can go to Session Three to see how to add contacts. You'll want to bookmark **answers.kw.com** for all your technology questions.

First Name	Last Name	Phone #	Email Address	Mailing Address	Notes	Date
Juanita	Lee	555-234-5678	jordan.lee@email.com	202 Congress Ave, Austin, TX 78701	RE Convo. Interested in buying soon.	9/9/25
Morgan	Martinez	555-456-7890	morgan.martinez@email.com	404 Guadalupe St, Austin, TX 78701	RE Convo. Youngest graduating from high school in May.	9/9/25
Casey	Brown	555-567-8901	casey.brown@email.com	505 E 6th St, Austin, TX 78701	RE Convo. Met at library networking event. Has a dog named Marlow.	9/9/25
Riley	Davis	555-678-9012		606 N Lamar Blvd, Austin, TX 78703	RE Convo. Renter. Getting a big raise in January. May want to look into buying after.	9/9/25
Quinn	Lopez	555-890-1234	quinn.lopez@email.com	808 E Cesar Chavez St, Austin, TX 78702	Convo. Asked me not to call again.	9/9/25
Jamie	White	555-901-2345	jamie.white@email.com		Referral. Considering upgrading to bigger home next year. Gave me Lori Hanson's number. She wants to buy her first home. They go to the same gym.	9/9/25
Lori	Hanson	555-012-3456	lori123@email.com	1001 W 5th St, Austin, TX 78703	RE Convo. Referred by Jamie White. Wants to buy first home. Likely a condo bc of work travel. Has $15,000 to put down. Gave lenders. Follow up Fri.	9/9/25

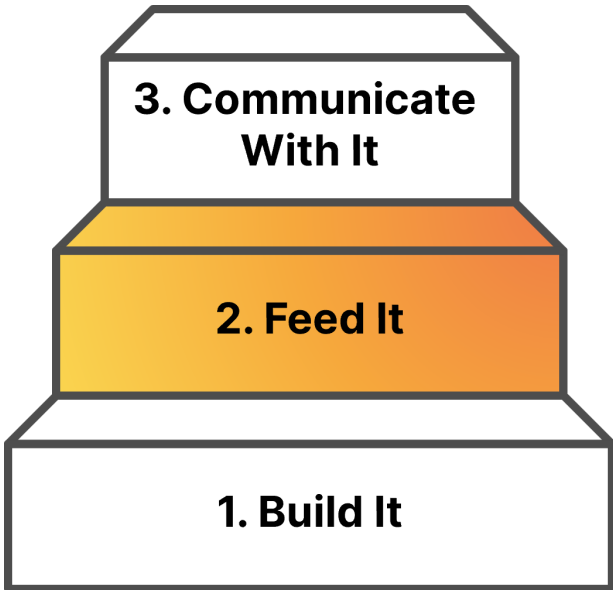
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2. Feed Your Database

Continually feed your database with new leads. Your database needs to grow every day for your business to grow.

A lead **is:**_____



Lead Generation:

1. The process of finding people who need to buy or sell real estate
2. How we create opportunities from our connections and turn relationships into results
3. Your 20%

Lead generation **is:**_____

Subscribe to **The Twenty Percenter** Newsletter for FREE at **thetwentypercenter.com** to get weekly wisdom to grow your business.

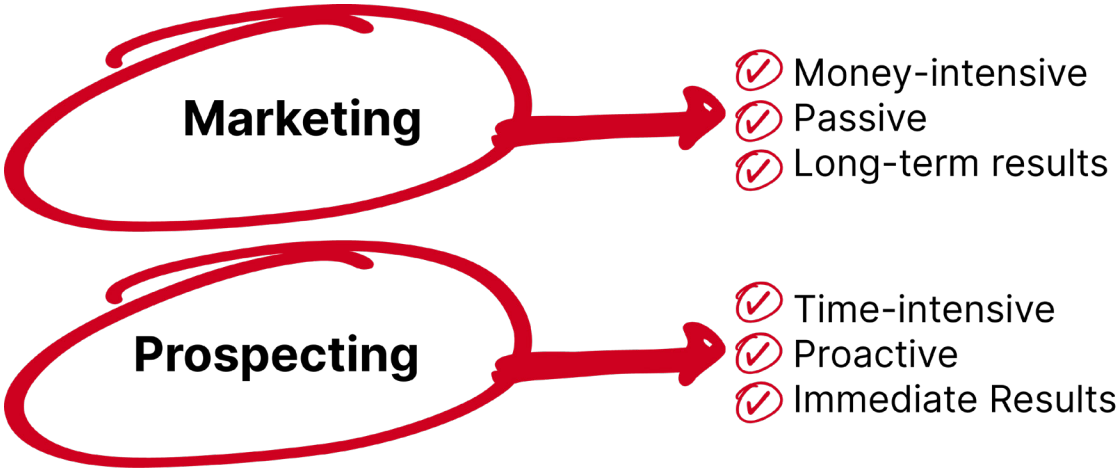
Lead generation isn't something to do only when we feel like it. At least not if you plan to be successful.

—The Twenty Percenter

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Prospecting and Marketing



Prospecting

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

Marketing

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

Both

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

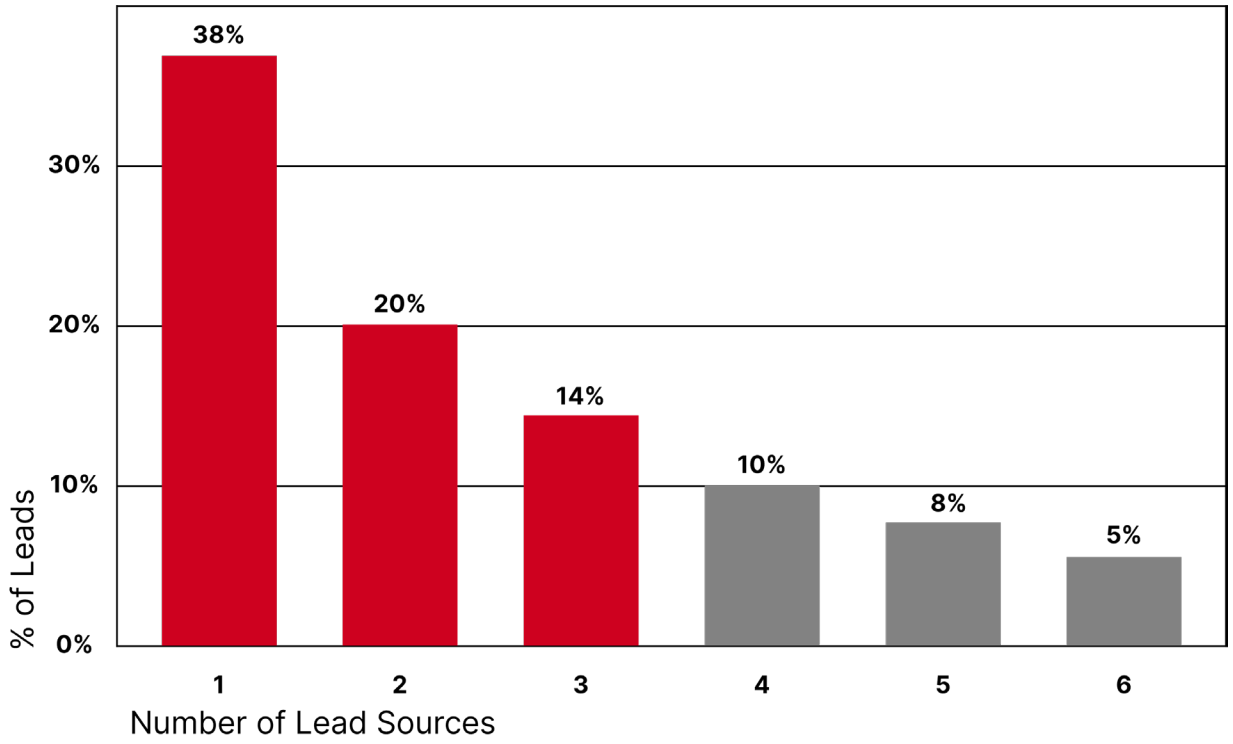
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The Rule of Three

- The Rule of Three shows that most leads come from an agent's top three lead sources.
- Fewer lead sources let you focus and track results.
- New agents often find success by focusing on their sphere of influence, open houses, and social media.
- Commit to mastering a few lead generation tactics, focusing primarily on prospecting early in your career.
- Ultimately, the lead sources you choose to focus on should align with your interests and strengths.



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Activity: 24-Hour Recall

Write down the events of your day yesterday. Then, note who you interacted with.

What You Did	Who You Interacted With

Agent Success Story

Scott Malouff came into the real estate industry with club promotion experience, so he knows the ins and outs of hosting great events. Though his team hosts large, impressive events, their micro events and the program he calls "50 First Dates" are a staple of their lead generation. Every week, every member of his team goes out to one coffee, one lunch, and one dinner with people from their database. They have coffee with someone they are trying to get into relationship with, lunch with a past client, and dinner with someone they determine to be a VIP for their business. During these "dates", they focus on serving their guest by being their "connector". If the guest mentions needing someone to do their landscaping or tutor their child, Scott and his team find someone to help. By connecting them and being of service, Scott and his team show the people in their database that they are here to help. Scott says that investing in people is the best investment you can make. Last year, his team made $1.4M from this strategy. Remember, real estate is a relationship business. What better way to build relationships than to have a meal and help someone out?

You can hear Scott's full interview on the MREA **Podcast** episode 57 by going to millionaireagentpodcast.com. Sign up to receive exclusive models weekly. Subscribe wherever you listen to podcasts and be sure to check it out each week for new episodes.

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Activity: Discover Your Network

You're connected to more people than you realize. Fill in the blanks with names of people you interact with regularly to see how big your network really is!

1. Your dentist

2. Your children's dentist

3. Your doctor

4. Your spouse's/partner's doctor

5. Your children's doctor

6. Your dermatologist

7. Your landscaper

8. Your household repair person

9. Your painter

10. Your plumber

11. Your electrician

12. Your pest control service

13. Your carpet cleaner

14. Your window cleaner

15. Your A/C and heat service person

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16. Your former teachers/coaches

17. Your fraternity brothers/sorority sisters

18. Your high school classmates

19. Your exercise trainer

20. Your children's teachers

21. Your children's coaches

22. Your children's friends' parents

23. People from your children's sporting events

24. Your spouse's/partner's close friends

25. Your parents' close friends

26. Your spouse's co-workers

27. Your wedding guests

28. Your car salesperson

29. Your auto repair mechanic

30. Your spouse's/partner's family members

31. Your manicurist/pedicurist

32. Your esthetician

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33. Your hairstylist

34. Your children's hairstylist

35. Your family members' friends

36. A notary public you know

37. Your "extended" family members (grandparents, cousins, nieces, nephews)

38. Your optometrist

39. Your massage therapist

40. Your computer repair person

41. Your TV or appliance service person

42. Your life insurance agent

43. Your homeowner's insurance agent

44. Your auto insurance agent

45. Your health insurance agent

46. Your business attire salesperson

47. Your tailor/seamstress for alterations

48. Your tax preparer/accountant/CPA

49. Your banker/lender

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50. Your favorite bank teller

51. Your stockbroker

52. Your veterinarian

53. Your pet sitter

54. Your pet groomer

55. Your lawyer

56. Your former co-workers

57. Your dietitian

58. Your local printer

59. Your next-door neighbors

60. Your neighbors across the street

61. Your wedding officiant

62. Your wedding photographer

63. Your wedding coordinator

64. Your tree trimmer

65. Your school classmates

66. Your dry cleaner

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67. Your mail carrier

68. Your UPS/FedEx delivery person

69. Your travel companions

70. Your theater companions

71. Your golf buddies

72. Your tennis partners

73. Your card-playing friends

74. Your hunting/fishing friends

75. Your hobby friends

76. People from your religious congregation

77. Your fantasy sports league's members

78. Your favorite restaurant owner

79. Your favorite server

80. Contacts in government or politics

81. Your college classmates

82. Your minister/clergy

83. Contacts from the country club

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84. Contacts from the fitness center

85. Contacts from daycare

86. Contacts from your local HOA

87. Your police/fire chief

88. Contacts from trade shows

89. Contacts from charity functions

90. Contacts from Rotary/Kiwanis/Lions Clubs

91. Contacts from local Chamber of Commerce meetings

92. Your housekeeper

93. Your water delivery service person

94. Your previous neighbors

95. Your military cohorts

96. Your retired co-workers

97. The most enthusiastic person you know

98. The most influential person you know

99. The wealthiest person you know

100. An architect you know

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101. A baker you know

102. An entertainer you know

103. Someone in human resources you know

104. People on your holiday card list

105. People whose holiday card list you are on

106. Your social network connections

107. Someone you met on a plane

108. Someone you know who seems to know everyone

109. Someone you know who's highly involved in the community

110. Someone who sells Pampered Chef, Mary Kay, or something similar

111. People you see in your office building

112. Your current or former landlord(s)

113. Person you would call to fix a roof leak

114. People from industry or trade groups

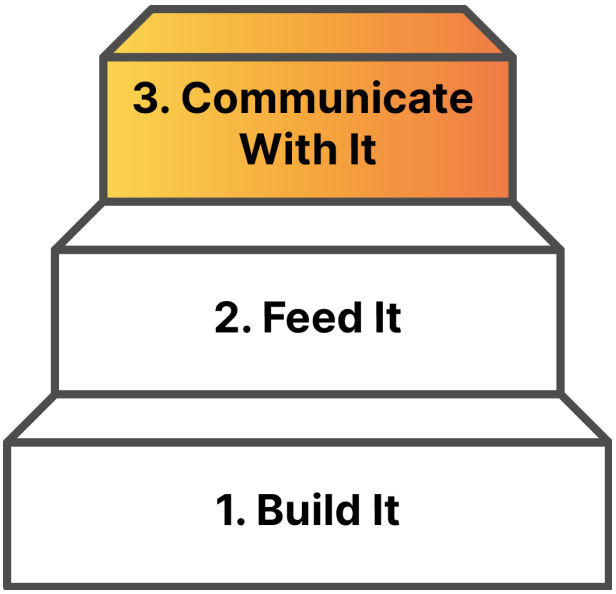
115. People you have met at a party recently

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3. Communicate with Your Database

- Stay top of mind with those in your database by staying in contact.
- Think of it this way: Products, services, and touch programs need to be either "useful" or "needed".
- If something is useful or needed, it's relevant. If something is relevant, it's valuable.
- Consistent, meaningful contact builds relationships. Pair touches with meaningful, relevant, and timely real estate information to provide value to those you connect with.
- Staying in contact will keep you top of mind with those in your database so that when they think of real estate, they think of you.



To succeed at a high level in real estate sales, you must commit to frequent contact with a database with the intent of building close relationships.

—Gary Keller

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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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FORD

F	Family: *Growing or shrinking?*
O	Occupation: *Relocation?*
R	Recreation: *Second home?*
D	Dreams: *When?*

FORD questions funnel us to real estate conversations. Write some other examples of FORD questions you can ask your SOI.

Family

"How's your family doing? I heard you just had a new baby!"

Occupation

"Are you still working at ABC Company? How are you enjoying that? Any changes in the works?"

Recreation

"What new restaurants have you tried around town lately? How were they?"

Dreams

"Where are you in your plan to retire to the mountains one day?"

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Create FORD Questions

	Open-Ended Questions	Closed-Ended Questions
Answer Type	More than a single-word answer	A single-word answer
Response Type	Own knowledge/feelings	Specific information
Information Provided	Deeper insights	Defined information
Answer Freedom	Free-form answer	Limited set of answers
Primary Use	To invite information	To close

Prompt: More FORD Questions with AI

→ Act as a real estate agent coach helping me practice building conversations with my sphere of influence. Use the FORD framework (Family, Occupation, Recreation, Dreams) to generate a list of 5-7 natural, friendly questions in each category that I could use in casual conversations (phone calls, texts, or coffee meet-ups). Make the questions open-ended, warm, and not salesy. Also, suggest two follow-up questions for each category that would keep the conversation going if the person shares something interesting.

Search **Command®** for the **AI Playbook** to learn how to write your own powerful prompts.

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Activity: Use the FORD Method with Your SOI

If they answer your call, exchange pleasantries and use the FORD framework to get into a meaningful conversation:

F: Family

O: Occupation

R: Recreation

D: Dreams

Exciting New Chapter Dialogue:

I wanted to share something exciting. I've officially started a new chapter as a real estate agent! I'm really passionate about helping people navigate big decisions like buying or selling a home. You've always been someone I value, so I just wanted you to hear it from me directly. If you or someone you know ever needs anything real estate-related, I'd love to be your go-to resource.

What are your real estate plans for the next year?

They will answer in one of three ways:

1. They don't plan to buy, sell, or invest in real estate in the next 12 months. If they say this, note it in your spreadsheet.
2. They do plan to buy, sell, or invest in the next year. If they say this, have a deeper conversation about what they plan to do and agree on a follow-up plan. These are the hidden opportunities!
3. They tell you that they just bought, sold, or invested without you. If they say this, congratulate them and tell them that you hope to be able to be of service to them in the future.

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!

Remember: Fill in the holes in your database after your conversation. This includes any notes such as when to follow up next or important things happening in their life at the moment. Be sure to clearly mark items you need to follow up on such as calling them back or emailing them market information, or even sending a condolence card if they disclose sad news. Keep in mind, you're following up as an agent and a person.

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FORD and Exciting New Chapter 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.

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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Use AI to Boost Your Real Estate Business

AI is not going to replace real estate agents. Real estate is and always will be a relationship-driven business. What AI can do is help you move through the "back end" work of your business more efficiently. One great way to use AI is to help practice conversation frameworks. AI can role-play a potential client, referral partner, or even skeptical friend.

Prompt: Create a New Introduction Conversation Framework with AI

→ I'm a brand-new agent who wants to reach out to my sphere of influence. Please write three different introduction conversations I can use when telling people I'm a real estate agent for the first time. Make each one sound conversational, approachable, and professional. Include one that is very casual, one that is a little more polished, and one that is more direct.

Prompt: Role-Play Your Conversation with AI

→ Please role-play with me as if you are someone from my sphere of influence. I will use a conversation framework to introduce myself as a real estate agent, and I'd like you to respond naturally. Act sometimes supportive, sometimes neutral, and sometimes skeptical so I can practice different scenarios. After a few exchanges, please give me constructive feedback on what I did well and what I could improve.

Other Places to Look for AI to Help You in Your Business:

1. Database tagging and organization
2. Marketing ideas
3. Writing help
4. Open house prep
5. Market explanations
6. Role-playing objection
7. Time blocking and productivity
8. Client education
9. Event ideas
10. Brainstorming networking angles

Search **Connect** for the **AI Playbook** to help you train your AI for your business and get insight into the AI you might want to use.

Use **KWIQ**, Keller Williams® propriety AI, to search for Keller Williams content.

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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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.

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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Connect with Your Network

Connect with Your Network Dialogue:

Exchange pleasantries. Start the conversation with something relevant about your connection with them. For example, if you are reaching out to your hairstylist, you can tell them that you're getting a lot of compliments on your last haircut.

I want to share some exciting news with you. I'm reaching out to tell you that I am now a real estate agent with (Market Center Name).

I want to be a helpful resource for you, whether that's providing market information, answering real estate questions, or connecting you to great local service providers.

Would it be okay if I added you to my contacts and kept in touch with occasional updates or helpful tips?

Awesome! Just in case, do you or anyone you know have any real estate goals this year that I could help with?

If they say yes, set a follow-up.

Great! What's the best email or phone number to keep in touch?

If no, thank them and reinforce staying in touch.

If the person you spoke with granted you permission, add them to your database spreadsheet and fill out as much information as you can about them.

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!

Prompt: Learn More About a Prospect with AI

→ Act as a professional research assistant and social intelligence strategist. I'm preparing for a first meeting with a professional contact to discuss their real estate goals. Use public Web data and contextual research to identify potential shared interests, values, or cultural touch points—especially those tied to this individual and their city. The person to research is: [NAME] of [LOCATION]. Your goals:

1. Identify natural, rapport-building angles (e.g., hobbies, affiliations, career overlaps, causes).
2. Provide insights I can reference conversationally without sounding like I researched them.
3. Generate a list of subtle, rapport-building questions I can ask—none should sound invasive or overly prepared.

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Database Truths

1. Whether you're creating a database or moving it, it should be an income-generating activity and not an administrative burden.
2. Incomplete or inaccurate data leads to lower conversion rates.
3. Transferring a messy database from one system to another creates a bigger mess.
4. Failing to keep in touch with your database negates the reason to have one at all.
5. Meaningful touches create meaningful relationships.

Aha's

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Habit Builder: Win the Morning, Win the Day.™

What does win the morning and win the day actually mean?

Win the day is the goal and winning the morning is how you do it.

It is funny, but those early hours of intense focus tend to pull me through the rest of the day. You can get so much going that it takes you the rest of the afternoon just to wrap things up. That's positive energy creating amazing momentum in your life.

—The Millionaire Real Estate Agent

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MREA **Energy Plan**

In the book, The Millionaire Real Estate Agent, Gary Keller discusses five areas where he needs energy: spiritual, physical, emotional, mental, and business. They are likely the same for you.

The Millionaire Real Estate Agent Energy Plan

1. Meditate and Pray: Spiritual Energy
2. Exercise and Eat: Physical Energy
3. Hug, Kiss, and Laugh: Emotional Energy
4. Plan and Calendar: Mental Energy
5. Lead Generate: Business Energy

What gives you energy in these areas? Let's make your plan.

1. **Spiritual Energy** _____ minutes
2. **Physical Energy** _____ minutes
3. **Emotional Energy** _____ minutes
4. **Mental Energy** _____ minutes
5. **Business Energy** _____ minutes (Approximately 3 hours of Lead Generation)

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Habit Builder: Time Blocking for Lead Generation

Lead generation is how you build your business energy. Top producers report spending around three hours a day lead generating. We are going to spend our time in Breakthrough 120 talking about how to lead generate to energize your business. For today, keep track of how long it takes you to have ten real estate conversations.

Find out more about Jennifer's story and how she lead generates on the **Keller Williams® YouTube Channel.**

Agent Success Story

Jennifer Young's team closes over 500 deals a year, a success she credits to one key principle: being purposeful and consistent with lead generation. Her "secret" is that there is no secret—just disciplined daily action. Every day from 9:00 AM to 12:00 PM, she focuses on lead generation. If she can't do it in the morning, she makes time for it in the afternoon. Not a single day goes by without her talking to people. That steady, relentless outreach is what drives her and her team's success.

Jennifer and her team also embrace every real estate opportunity, regardless of the price point. Whether it's a distressed property or a million-dollar home, they want to be the first name that comes to mind when people in their market think of real estate. They treat first-time buyers and rental clients with the same five-star service as their luxury clients. This commitment to exceptional service has paid off; their number one source of business is referrals from past clients and their sphere of influence. Jennifer's commitment to making her calls and serving her entire market has grown her business.

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Time Blocking

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Morning	MREA Energy Plan 1. Spiritual energy 2. Physical energy 3. Emotional energy 4. Mental energy 5. Business Energy 1. Role play & pres. practice 2. Lead generation 3. Lead follow-up					1. Open houses 2. Recreation 3. Reflection 4. Rest	
Afternoon	1. Open house plan 2. Social media engagement 3. Meet with potential buyers 4. Meet with potential sellers						
Evening	1. Open houses 2. Recreation 3. Reflection 4. Rest						

Listen to the MREA and ONE Thing Podcasts

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning	**MREA Energy Plan** Spiritual: (: - :) Physical: (: - :) Emotional: (: - :) Mental: (: - :) Business: (: - :)	**MREA Energy Plan** Spiritual: (: - :) Physical: (: - :) Emotional: (: - :) Mental: (: - :) Business: (: - :)	**MREA Energy Plan** Spiritual: (: - :) Physical: (: - :) Emotional: (: - :) Mental: (: - :) Business: (: - :)	**MREA Energy Plan** Spiritual: (: - :) Physical: (: - :) Emotional: (: - :) Mental: (: - :) Business: (: - :)	**MREA Energy Plan** Spiritual: (: - :) Physical: (: - :) Emotional: (: - :) Mental: (: - :) Business: (: - :)
Afternoon					
Evening					

Listen to the MREA and ONE Thing Podcasts

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Closing

Aha's

Learning Application

1. Complete 24-Hour Recall and Expand Your Network activities if needed.
2. Time block your MREA Energy Plan in your calendar for the next month.
3. Continue reaching out to the people who know, like, and trust you until you have had at least 10 real estate conversations. Be sure one conversation is with a member of your network.
4. Be ready to work in Command® in our next session. Access it on your computer and download and log into the Command® App on your phone.
   - 4.1 Go to Command and search "Log in to Command and/or Reset Your KW Password" to log into Command on your computer for the first time.
   - 4.2 Go to Command and search "Create an Account and Log In to Your KW App" to download the Command App to your phone.
5. Be ready to share your progress report at the beginning of our next session.
6. Every session, we will share our lead generation progress. You'll report:
   - 6.1 Number of contacts you added to your database
   - 6.2 Number of TCPA-compliant calls you made
   - 6.3 Number of real estate conversations you had
   - 6.4 Real estate follow-up opportunities
   - 6.5 Challenges
   - 6.6 Aha's

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