KW CODEBOOK

— AGENT EDITION —

MODELED ON
MREA

DESIGNED BY
AGENTS

BUILT FOR
ENTREPRENEURS

kw Where Entrepreneurs Thrive

NOTICES

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.

General

While Keller Williams Realty, LLC (KW) has carefully prepared all materials, we do not guarantee their accuracy or make any express or implied warranties about the information. KW may change the material at any time without notice.

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.

These materials and examples are provided for informational purposes only; they are not a guarantee or prediction of performance, sales, or profits. Agent productivity strategies are models only, not requirements. Independent contractors should set their own goals and strategies. You should not (1) assume that the results of these exercises and models predict your or a Keller Williams® Market Center's financial performance, or (2) consider or rely on the results of the exercises and models in deciding whether to make any investment. You should consult your own legal or financial advisor and verify all information to your satisfaction. The instructors do not hold financial licenses. You should consult your own legal, financial, or tax advisor and verify all information to your satisfaction prior to taking any action.

Negotiating Commissions

Commissions are not set by law or practice and are fully negotiable. There is no commission standard and pricing will vary by agent and market conditions. KW does not determine commissions and plays no role in establishing commissions.

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.

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.

AI Disclaimer

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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WHAT IS THE KW CODEBOOK?

In 2017, you decided to lead a revolution in thinking:

1. Agent technology should be BUILT BY AGENTS.
2. Agent technology should be BUILT FOR AGENTS.
3. Agent technology should be OWNED BY AGENTS.

"We discovered that we had real AI all along … AGENT INTELLIGENCE."
– John Keller

That simple premise sparked what would become an incredible journey of listening and creating. Today, we have Command, Command Mobile, Connect, and Consumer. At a scale few thought possible, we protect our own data, generate our own leads, create our own workflows, and command our own databases.

You challenged us to teach real estate, not technology. That's exactly what the KW Codebook is.

We interviewed hundreds of the world's highest producing real estate agents and documented their systems and models. They all gave their time and their secrets because that's what Keller Williams® agents do: they love and help each other. We made a list of everything they do each day to GROW and RUN their businesses. We took that list and asked "Does Command do that?" and "How would you do that in Command?"

The answers lie in the following pages.

The "How You Do It" page lists actions that help you grow and run your business. Each is assigned a number. These numbers are associated with corresponding Tech Plays that show you how to perform each action in Command.

When you perform the Tech Plays in your preferred order, you end up with your very own CODE to grow and run your business.

This is the place, and this is the technology, built for entrepreneurs to thrive.

WHAT YOU DO

WHAT YOU DO: GROW THE BUSINESS

- Database Engagement
- Expired/Canceled
- FSBO
- Door Knock
- Open House
- Client Events
- Seminars
- Pop-Bys
- Social Ads
- PPC
- Farming
- Real Estate Newsletter/Magazine (printed)
- Real Estate Newsletter/Magazine (digital)
- Social Media Post (non-paid)
- Forced Registration
- Reverse BOLD
- Circle Prospecting
- Philanthropy
- Print Ads

WHAT YOU DO: RUN THE BUSINESS

- Make Buyer/Listing Presentations
- Show Houses/Schedule Showings
- Pre-Listing work (staging, clean up, etc.)
- Order Photos/Video
- Market Listings
- Write Contracts
- Negotiate Contracts
- Inspections
- Broker Compliance
- Receive Commission
- Vendor Management
- Attend Training/Get Coaching
- Track Goals / Progress
- Manage Money
- GPS/411
- Calendar Connection

HOW YOU DO IT

HOW YOU DO IT: ALL AGENTS

1. Make TCPA-compliant Calls (single)
2. Make TCPA-compliant Calls (bulk)
3. Voicemail Drop
4. Send TCPA-compliant Text Messages (single)
5. Send TCPA-compliant Text Messages (bulk)
6. Send Email (single)
7. Send Email (bulk)
8. Lead Capture
9. Track & Log interactions (contact/lead)
10. Export Mailing Labels
11. Buy Gifts
12. Set-up Searches
13. Set up Showings
14. Run CMAs
15. Create Marketing Material
16. Create Squeeze Pages/Forced Registration
17. Use Marketing Material (pre-made)
18. Send Direct Mail
19. Post to Social Media (free)
20. Run Social Media Ads (paid)
21. Create Follow Up Plans
22. Use Follow Up Plans
23. Manage Daily Tasks
24. Create Workflows & Processes
25. Use Workflows & Processes
26. Prepare Agreements
27. Write Contracts
28. Compare Offers
29. Submit for Compliance
30. Submit for Commissions
31. Communicate with Vendors
32. Register for Classes
33. Attend Classes/Learning (Connect/Help Articles)
34. Track Lead Gen Activities

HOW YOU DO IT: AGENT + ADMIN

AA1. Create Additional User

AA2. Grant Permissions

AA3. Delegate Tasks

HOW YOU DO IT: TEAM

T1. Route Leads

T2. Reporting for Agents

HOW YOU DO IT: EXPANSION

E1. Database Visibility across Market Center/State and National Boundaries (Contacts, Activities, etc)

E2. Combined Reporting/Tracking - Lead Gen

E3. Route Leads across Teams

E4. Delegate Tasks across Teams

E5. Grant Permissions across Teams

E6. Team Marketing Templates

E7. Team Campaigns

WARNING!

Telephone Consumer Protection Act / Do Not Call

The Telephone Consumer Protection Act (TCPA) regulates calls and texts to cell phones and landlines, autodialed calls, prerecorded calls, faxes, and calls and texts to numbers on Do Not Call (DNC) lists. Class action litigation for TCPA/DNC violations is increasing, potentially exposing agents, Market Centers and KWRI to catastrophic financial damages. Consult an attorney for guidance on the TCPA and DNC laws, including consent requirements, autodialer restrictions and prerecorded messages.

TCPA

Auto Dialers
The TCPA regulates calls and texts to a cell phone using an "automatic telephone dialing system" (which may include a dialer).

Prior Express Written Consent/ Written Consent
In certain cases, a caller must have prior express consent before making a call. In other cases, prior express written consent is required, including for certain texts.

Artificial Voice / Prerecorded Messages
Never use artificial voice or prerecorded messages without an individual's prior express written consent. Damages can be $500 to $1,500 per violation.

State Telemarketing Laws
Several states have their own laws governing telemarketing. Talk with your broker about any local and Market Center rules and DNC lists.

DO NOT CALL DO'S AND DON'TS

Under federal law, sellers and telemarketers may not call numbers listed on the Federal Trade Commission's Do Not Call (DNC) Registry. Failure to comply with DNC laws could result in a TCPA class action lawsuit or substantial government fines. Penalties for a DNC violation can total up to $46,517 per call. Consult an attorney regarding compliance with DNC laws.

✓ **Subscribe to the Registry**
The DNC Registry is hosted on a dedicated website. Your Market Center should subscribe to the Registry and give you login credentials. Making any telemarketing calls without access to the Registry violates federal law.

✓ **Maintain Internal DNC List**
Consumers have a right to request that you not call or text them. Consumers can revoke prior consent at any time. Keep a record of Do Not Call requests you receive.

✓ **Check Before You Call or Text**
Before making a call or text, check to see if the number is on any of these lists: 1) National Do Not Call Registry; 2) state Do Not Call list; or 3) Market Center and agent internal DNC lists. If the number is on any of these lists, do not call or text it.

✓ **Honor Do Not Call Requests**
Never call or text a number on the DNC Registry or a state DNC list unless you have proper consent. Don't call or text someone who has asked to be on your internal DNC list.

For more information, visit http://www.kwconnect.com/page/industry-resource/dnc

TCPA/Do Not Call Compliance Pointers

Does the Prior Express Written Consent Requirement Apply Under the **Telephone Consumer Protection Act (TCPA)**?

1

For calls to **residential phones**: Do calls use an **artificial voice** or **prerecorded message**?

IF NO the TCPA does not apply unless the number is on a Do Not Call List.

IF YES TO EITHER, proceed to (3).

2

For calls to **mobile phones**: Do calls use an **artificial voice** or **prerecorded message** OR an **automatic telephone dialing system** (which may include a dialer)?

IF NO the TCPA does not apply unless the number is on a Do Not Call List.

IF YES and the call does **NOT** contain telemarketing, then you need only **prior express consent** (meaning, the consumer game you their cell phone number).

IF YES and the call **does contain telemarketing,** then proceed to (3).

3

Does the call contain **telemarketing**?

IF NO the written consent rules do not apply; however, **prior express consent** (verbal or written) is still required for certain calls made to cell phone numbers and residential numbers.

IF YES, proceed to (4).

TELEMARKETING

Telemarketing includes **an offer or promotion of goods or services.** (It also includes calls that have multiple purposes, so long as one of the purposes is telemarketing.)

PRIOR EXPRESS WRITTEN CONSENT

Prior express **written** consent is required for calls to cell phones as described in step 2. Prior express **written** consent is also required for certain calls to residential lines which use an artificial voice or prerecorded message.

4

Written consent is required prior to initiating telemarketing calls and texts as follows:

Prior express written consent is required to make telemarketing calls to cell phones (including text messages) using
1) an artificial voice
2) prerecorded message
3) automatic telephone dialing system (which may include a dialer).

Prior express written consent is required to make telemarketing calls to residential lines using an artificial voice or prerecorded message.

Prior express written consentis required to make telemarketing calls and texts to personal telephone numbers on a Do Not Call list.

Federal, state, and internal Do Not Call lists must be checked at least monthly.

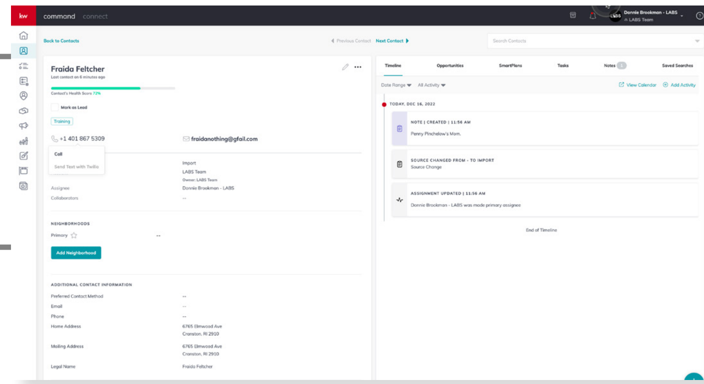
For more information, visit http://www.kwconnect.com/page/industry-resource/dnc

#1 MAKE TCPA-COMPLIANT CALLS SINGLE

Command offers two ways to make single phone calls to contacts in your database. Agents can use the click to call option on desktop that initiates a call on connected cell phone/device. Agents can initiate calls on the Command App through their device or WhatsApp (common for international calls). All calls end with prompts to log interactions to contact timeline.

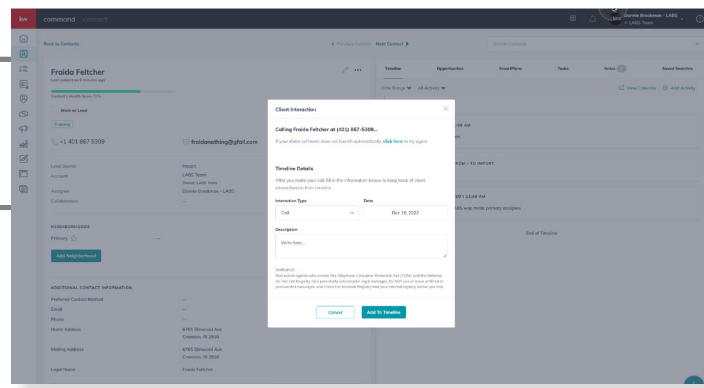
CLICK TO CALL

1. Open contact record
2. Click on phone number
3. Choose “Call”



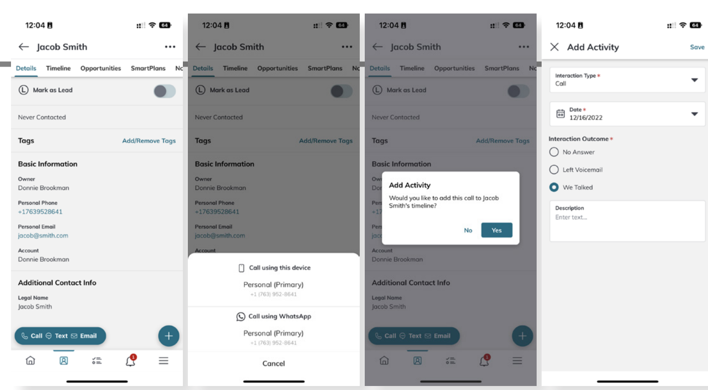
LOG CLIENT INTERACTION

1. Log client interaction notes
2. Confirm “Add to timeline”



CLICK TO CALL (COMMAND APP)

1. Open contact
2. Click “Call”
3. Choose call via cell phone or WhatsApp (common for international calls)
4. Confirm “Yes” to add activity
5. Log notes from interaction
6. Save interaction



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#2 MAKE TCPA-COMPLIANT CALLS BULK

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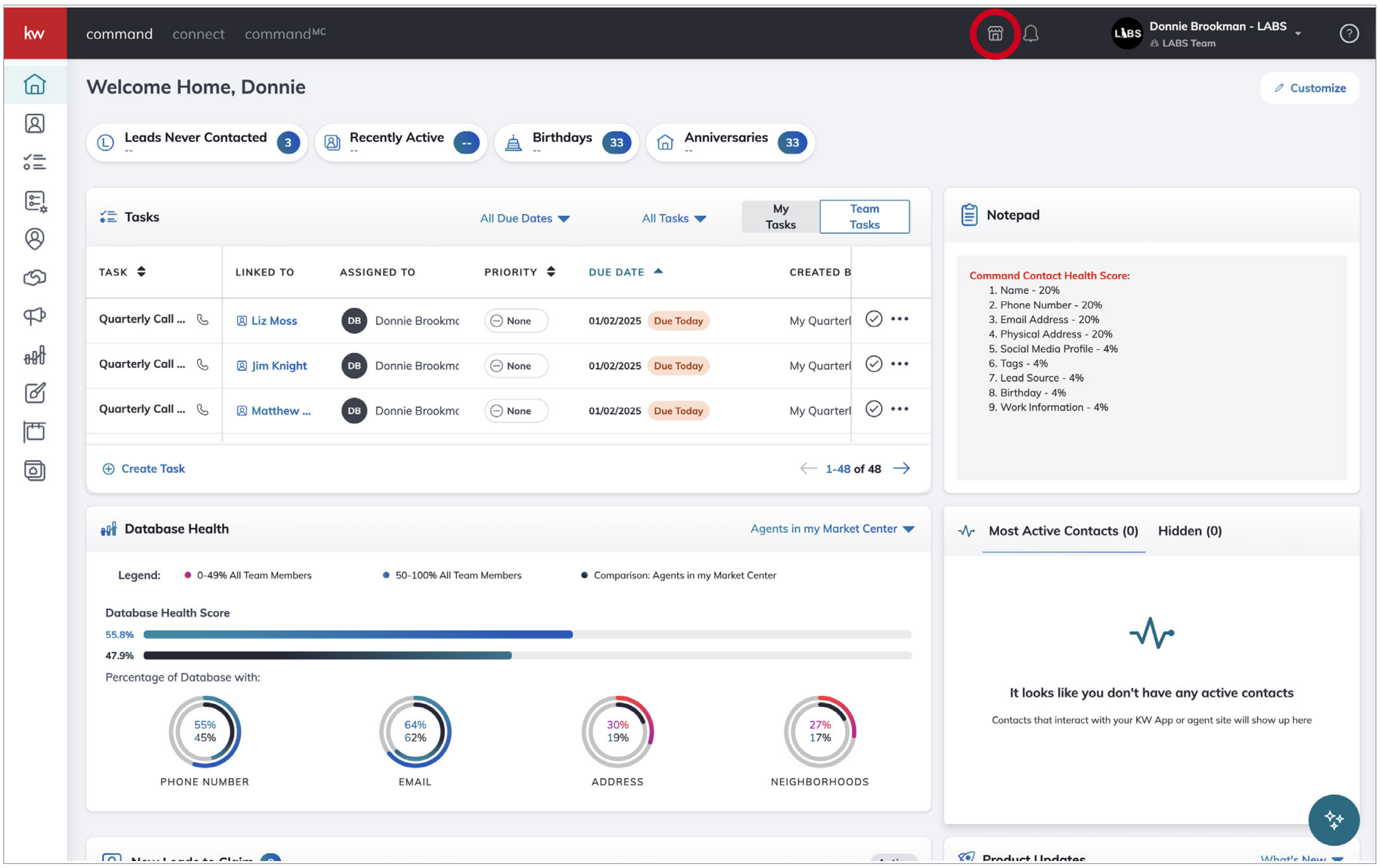
Make the **KW Marketplace** your first stop
when finding partners that can help you thrive!



Built by agents for agents
means that you decide
what we build next.

Join LABS today to help
guide our roadmap!

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#3 VOICEMAIL DROP

There is no in-product solution. Keller Williams does not endorse, recommend, or encourage the use of Voicemail Drops. The TCPA requires that callers have *prior express written consent* before calling a consumer for telemarketing purposes and using a prerecorded message, including Voicemail Drops. For all other purposes, *prior express consent* is required.

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Join LABS today to help guide our roadmap!

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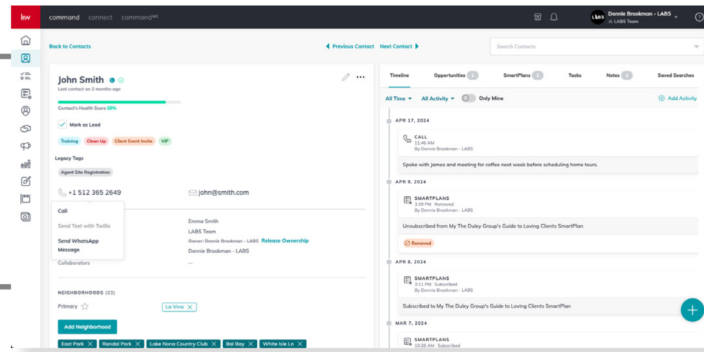
#4 SEND TCPA-COMPLIANT TEXT MESSAGES SINGLE

Agents can send a single text message using their chosen system number (Twilio) through Command on desktop. Texts are automatically logged on contact timeline. **Agents can send texts from the Command App through Twilio, their cell phone, or WhatsApp.** Prompts for adding the activity (cell phone or WhatsApp) will appear after returning to Command App.

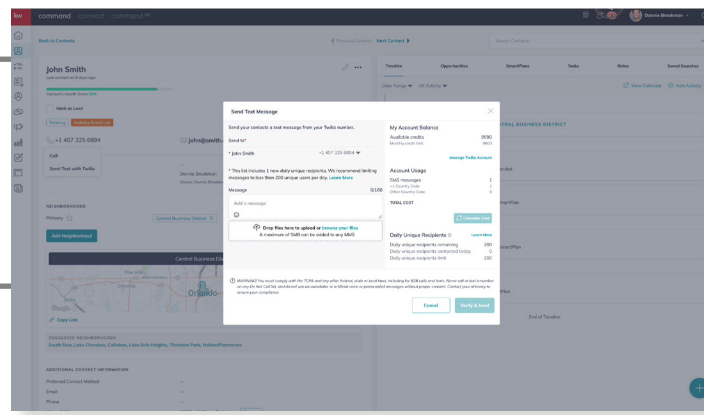
SEND A TEXT MESSAGE (COMMAND PLATFORM)

1. Open the contact record
2. Click on phone number
3. Choose "Send Text with Twilio"



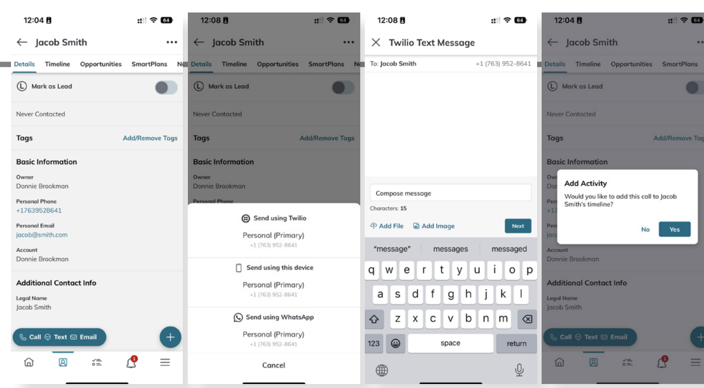
COMPOSE MESSAGE

1. Compose message
   a. Include Emojis (optional)
   b. Include image (optional)
2. Verify and send



SEND A TEXT MESSAGE (COMMAND APP)

1. Open contact record
2. Tap on "Text"
3. Confirm selection
   a. Send using Twilio, cell phone, or WhatsApp
4. Log Activity (cell phone and WhatsApp only)



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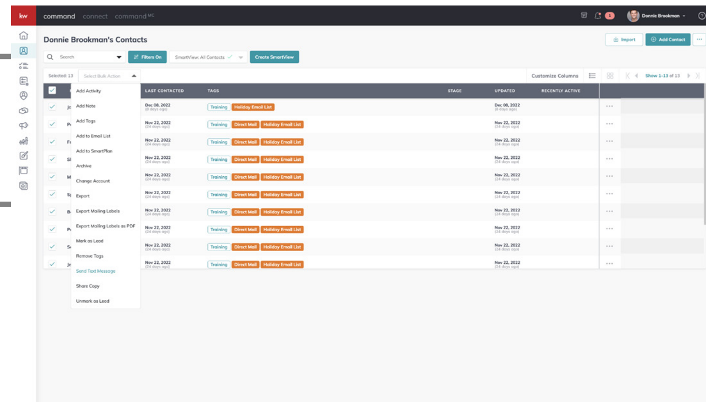
#5 SEND TCPA-COMPLIANT TEXT MESSAGES BULK

Command allows agents to send bulk text messages through Twilio to up to 500 contacts at a time. Agents must comply with the TCPA and ensure that they have proper consent to text each of the contacts.

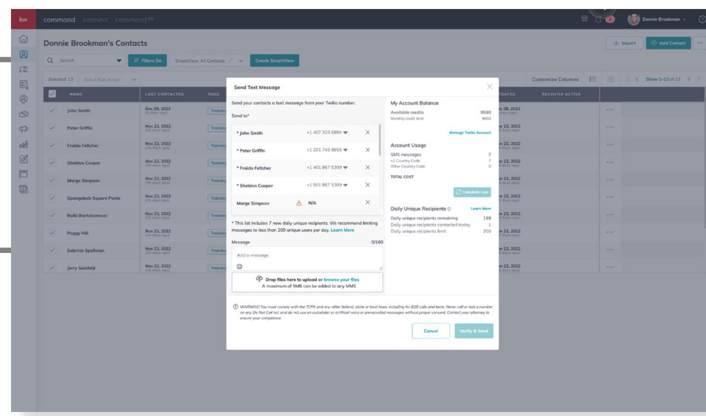
SELECT GROUP OF CONTACTS

1. Use filters and sorting
2. Select number of contacts desired



COMPOSE MESSAGE

1. Compose message
2. Add image (optional)
3. Verify and send



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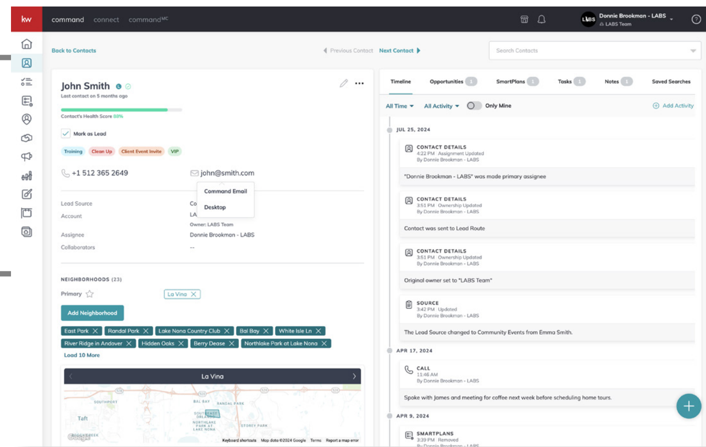
#6 SEND EMAIL SINGLE

Agents can send a single email to a contact in Command using the Command Email platform. Clicking on an email address from a contact record will open a compose modal with the option to customize text, formatting, attachments, and email signatures.

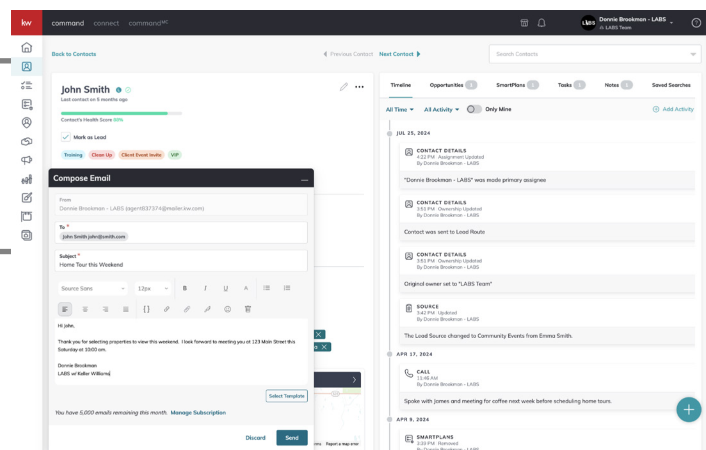
SEND EMAIL (SINGLE)

1. Open contact record
2. Click on Contact's email address
   a. Select to send with Command Email or Desktop



COMPOSE EMAIL (SINGLE)

1. Add text to complete email
2. Apply formatting (optional)
3. Confirm "Send"



#7 SEND EMAIL BULK

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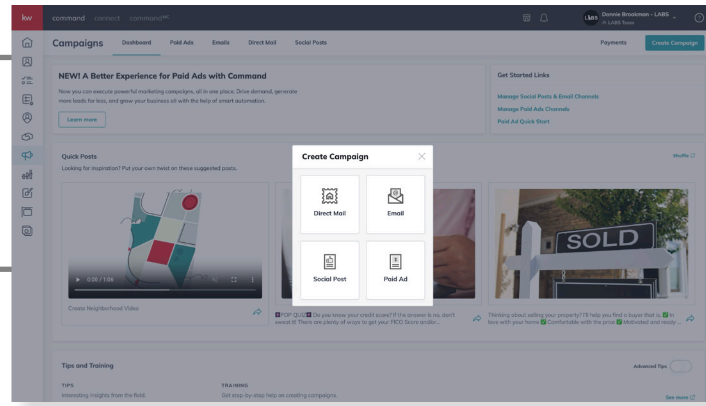
Command provides agents up to 5,000 emails monthly with the option to upgrade. Emails can be sent in bulk through a Bulk Action in Contacts or an Email Campaign. Email campaigns allow agents to build targeting lists and schedule in advance. The bulk action in Contacts provides a simple, one-off approach to executing the task.

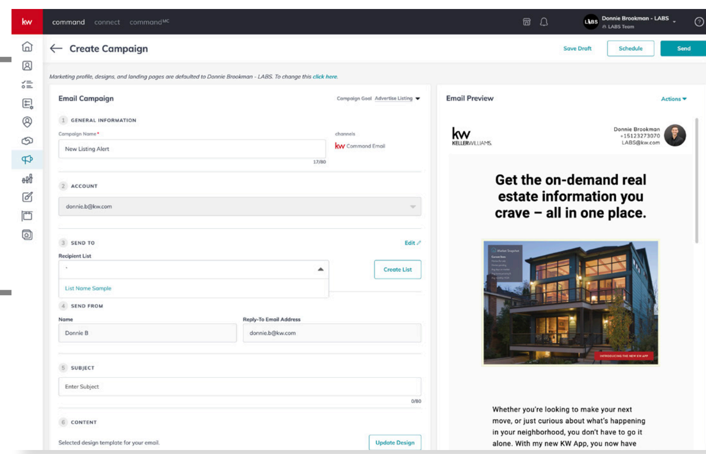
CREATE EMAIL CAMPAIGN

1. Campaigns Applet > Create Campaign > Select Email
2. Add a Campaign Name, Goal, and confirm Create



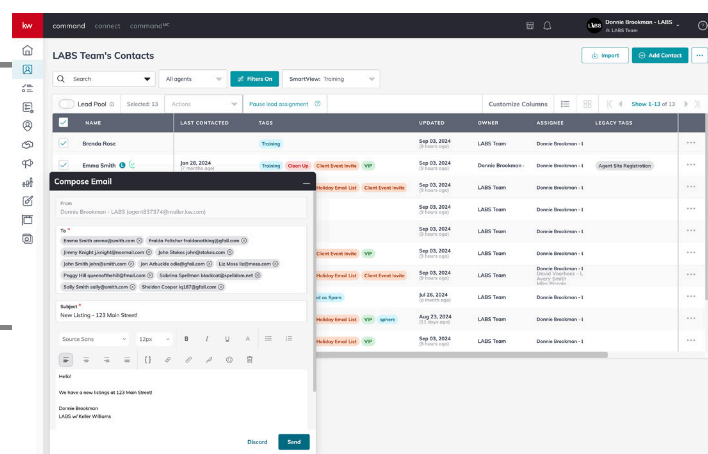
CUSTOMIZE CAMPAIGN

1. Confirm Recipient List, Edit, or Create List
2. Complete Subject Line
3. Select a Design template or Create
4. Save Draft, Schedule to send, or Send



CONTACTS > BULK ACTION SEND EMAIL

1. Open Contacts and select desired amount (up to 500)
2. Choose "Send Email" bulk action
3. Compose email and confirm with Send

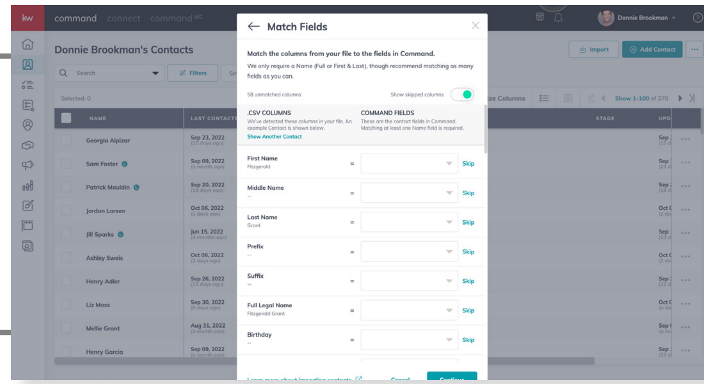


#8 LEAD CAPTURE

Leads can be added to KW Command manually, file import, from another CRM/Technology provider through API Nation, or captured from the associated consumer experience. You should have proper consent to call/text any phone numbers you add and/or scrub the numbers against the Federal Do Not Call Registry and your internal Do Not Call list.

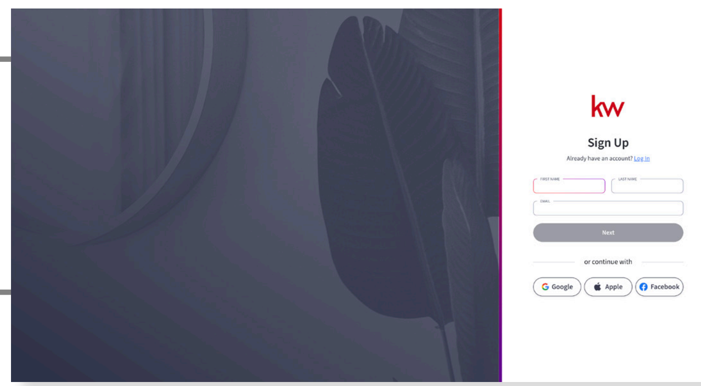
CONTACT IMPORT

1. Open Command > Contacts
2. Select "Import"
3. Download template or upload a custom file
4. Map fields
5. Continue to Import



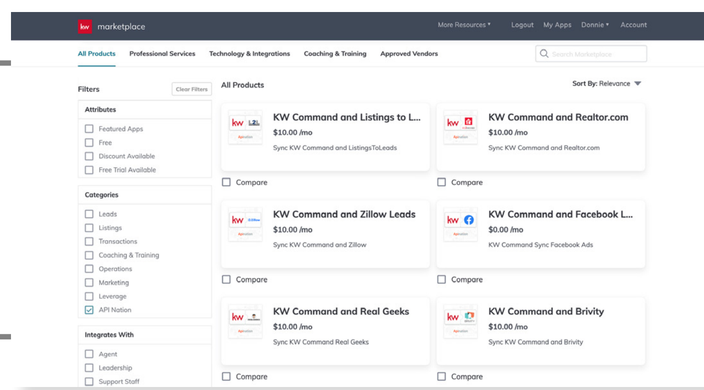
CONSUMER LEAD CAPTURE

Leads captured from KW agent sites & mobile app will be mapped to Command > Contacts. Command's Campaigns applet also has social ad lead capture forms built in.



API NATION [MARKETPLACE]

API Nation can be purchased in the Marketplace to bidirectionally sync contacts between Command and 22 popular systems. Options range from Google, iCloud (Apple), Realtor.com, Zillow, and more.



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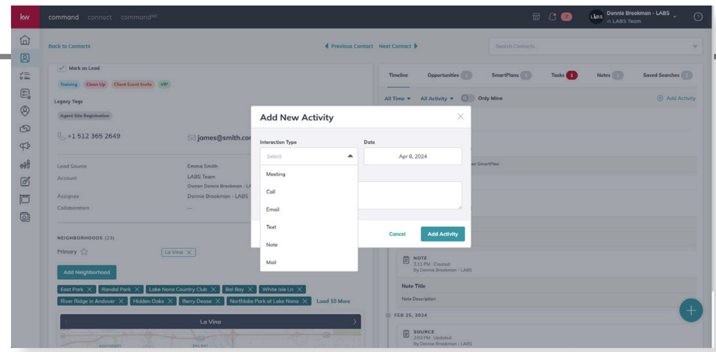
#9 TRACK AND LOG INTERACTIONS

Agents can log calls, texts, meetings, emails, or leave notes on a contact record in Command. This can be done individually form the contact record on desktop or on the Command App. Agents can also log activity for multiple contacts using a bulk action. Many activities are automatically logged on the agents behalf from a SmartPlan or completing task activity.

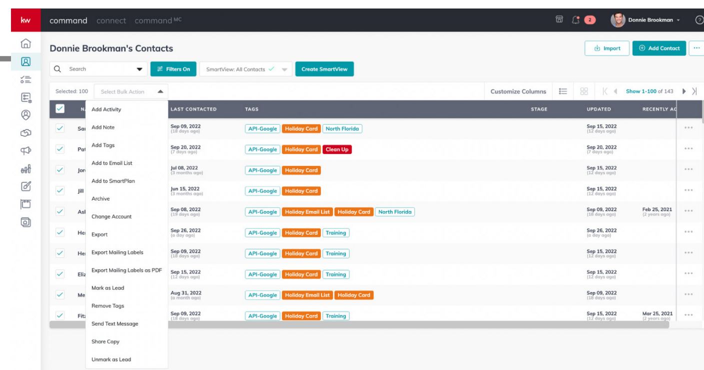
ADD ACTIVITY

1. Open contact record
2. Choose blue + button
3. Choose Add Activity [$] button
4. Change activity type
5. Set date
6. Add notes/details
7. Confirm "Add Activity"



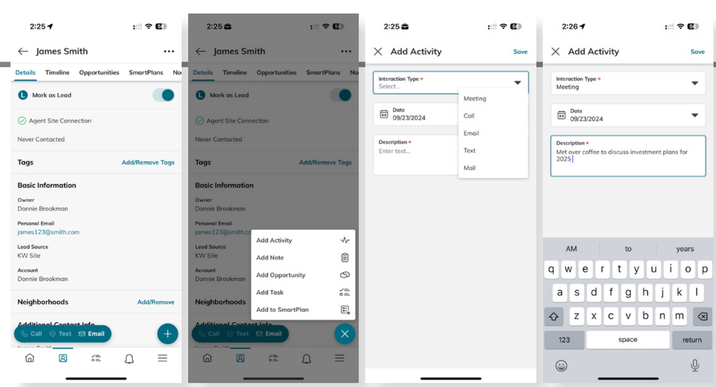
ADD ACTIVITY (BULK)

1. Open contacts
2. Filter and select desired contacts
3. Choose "Add Activity" in bulk actions dropdown
4. Change activity type
5. Set date
6. Add notes/details
7. Confirm "Add Activity"



ADD ACTIVITY (COMMAND APP)

1. Open contact record
2. Choose blue + button
3. Choose Add Activity
4. Change activity type
5. Set date
6. Add notes/details
7. Confirm "Save"

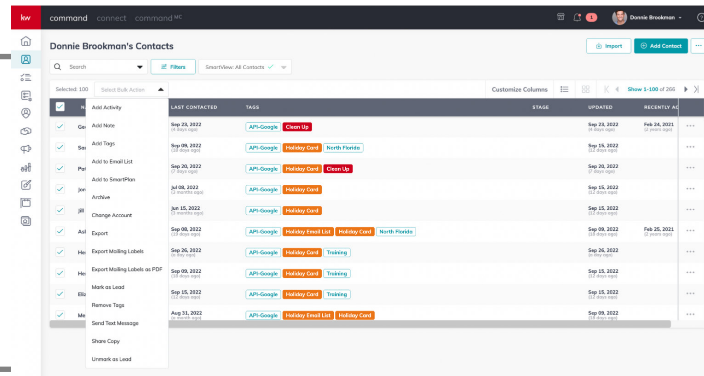


#10 EXPORT MAILING LABELS

Agents can download mailing labels ready to print up to 500 contacts at a time. Mailing labels can either be exported in a PDF and ready to print or in a spreadsheet for a custom mail merge.

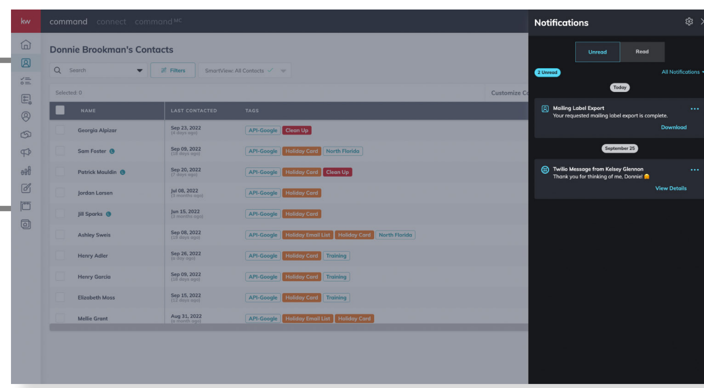
BULK EXPORT MAILING LABELS

1. Filter contacts
2. Select desired contacts
3. Choose “Export Mailing Labels as PDF”
   a. Print ready file
4. Choose “Export Mailing Labels”
   a. Spreadsheet ready for custom mail merge



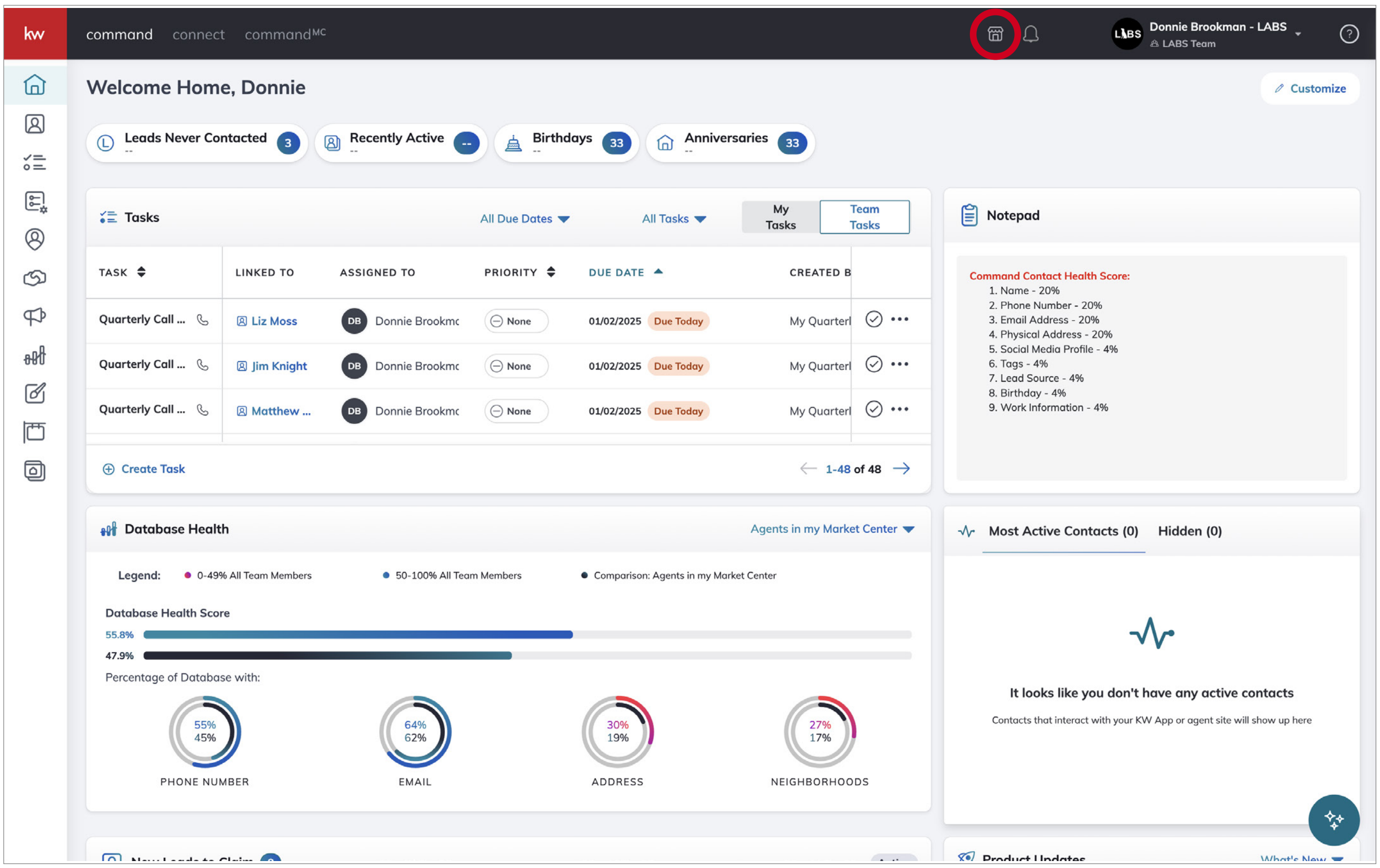
DOWNLOAD FILE

1. Click notification bell
2. Tap “Download” for export notification



#11 BUY GIFTS

Make the **KW Marketplace** your first stop
when finding partners that can help you thrive!



Built by agents for agents
means that you decide
what we build next.

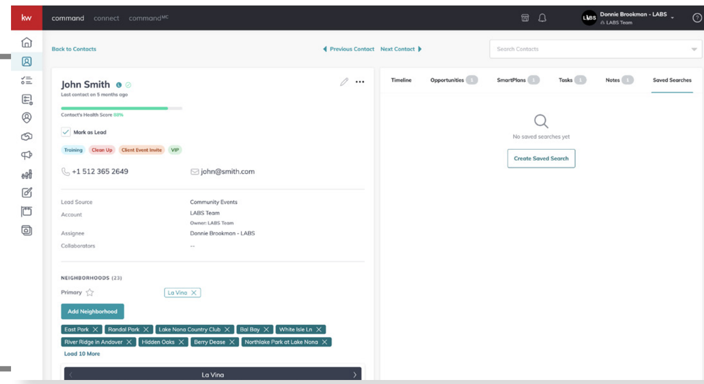
Join LABS today to help
guide our roadmap!

#12 SET UP SEARCHES

Agents can create MLS searches with updates from the contact record. These searches can exist in any area with KWLS coverage (U.S. and Canada), regardless of whether an agent is a member of the MLS. Create a saved search by neighborhood, zip code, or custom drawn area with a variety of property specific parameters. Set up customer email notifications or let them manage preferences in the connected Consumer experience.

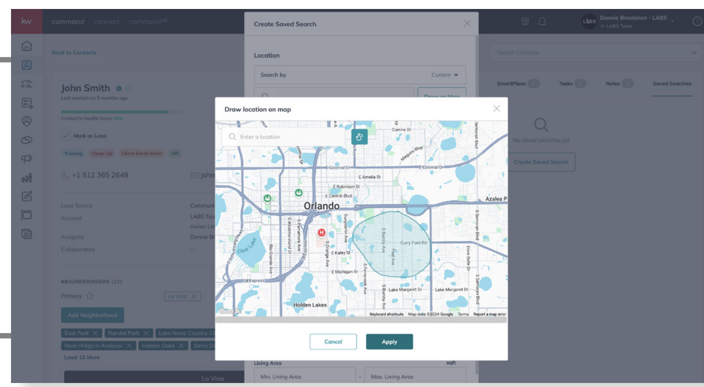
MANAGE SAVED SEARCHES

1. Open contact record
2. Click on “Saved Searches” tab
3. View all saved searches
   a. Edit agent created
   b. View consumer created
4. “Create Saved Search” to start a new search



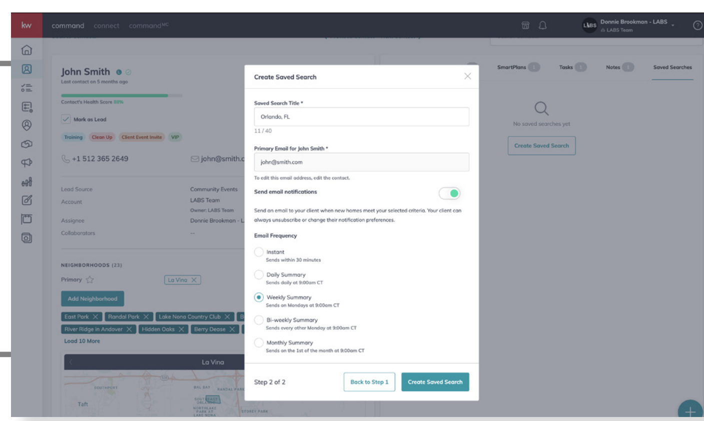
CUSTOMIZE SEARCH

1. Search by location: neighborhood, zip code, or drawn area
2. Set property filters: beds, baths, property type, price, amenities, year built, listing status, living area, parking, open house, and price reduced within 7 days



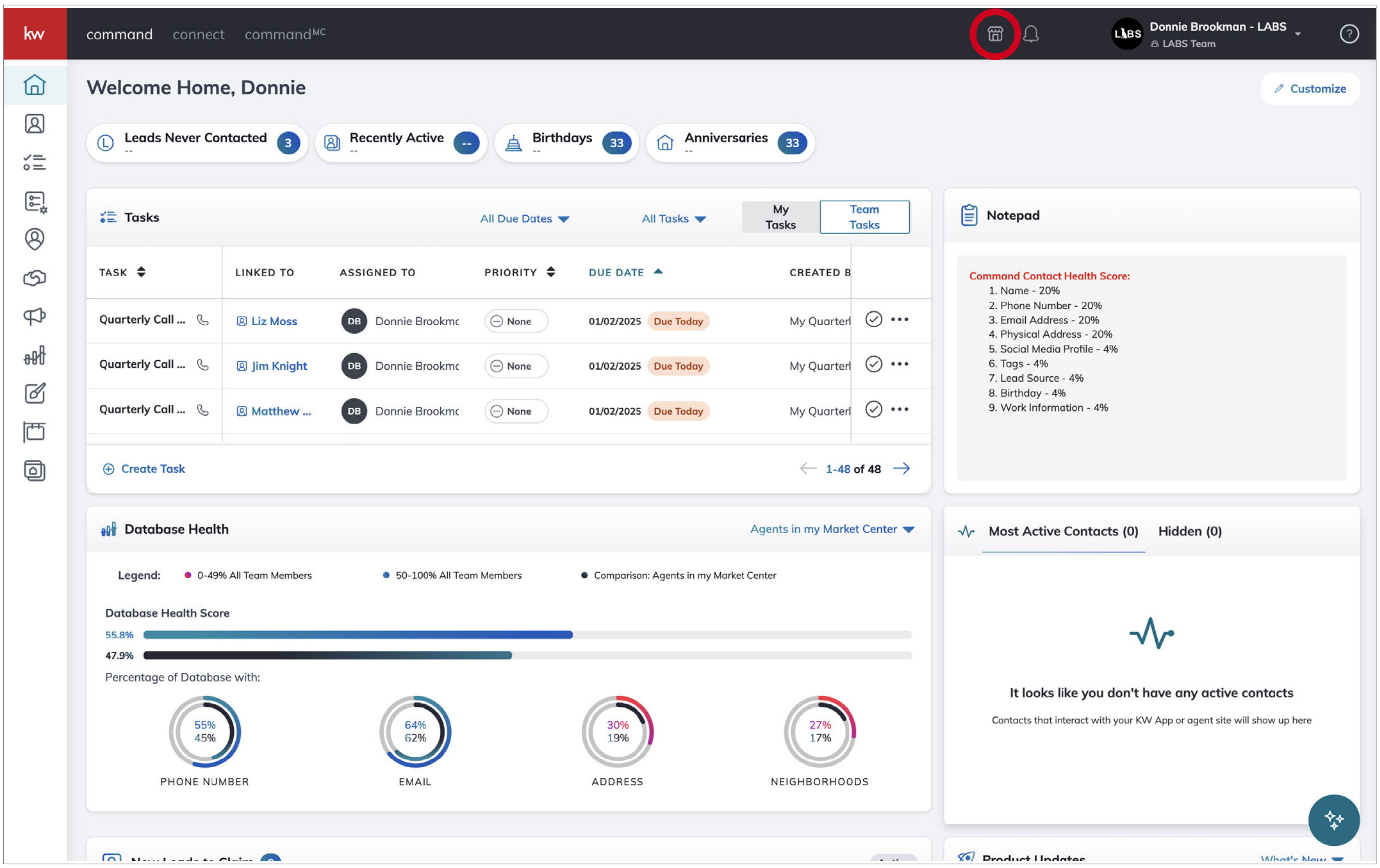
SET EMAIL NOTIFICATIONS

1. Title the saved search
2. Toggle send email notifications (optional)
   a. Instant (30 minutes), daily, weekly, biweekly, or monthly
3. Consumer can view and customize notifications from connected profile.



#13 SET UP SHOWINGS

Make the **KW Marketplace** your first stop
when finding partners that can help you thrive!

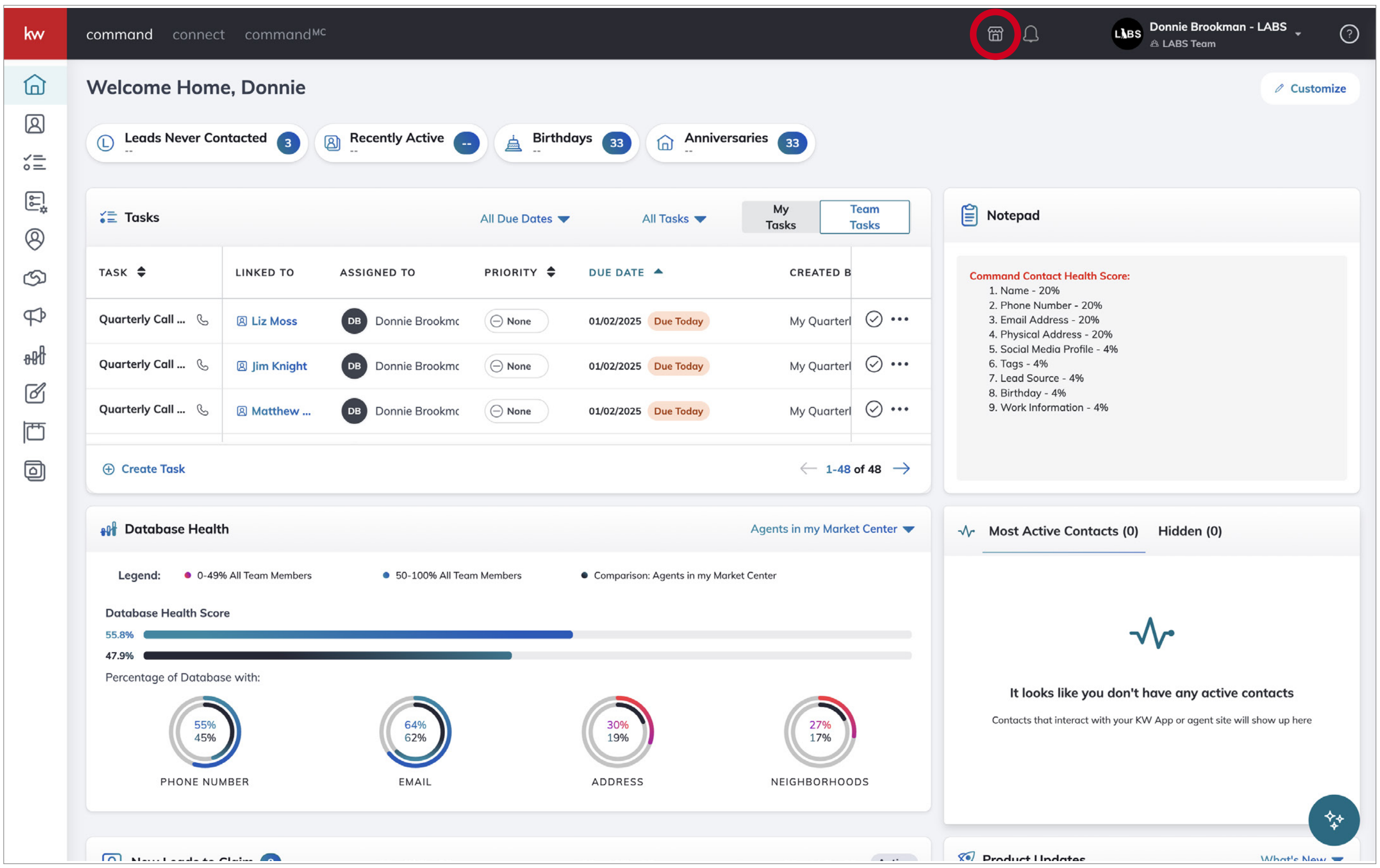


Built by agents for agents
means that you decide
what we build next.

Join LABS today to help
guide our roadmap!

#14 RUN CMAs

Make the **KW Marketplace** your first stop when finding partners that can help you thrive!



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what we build next.

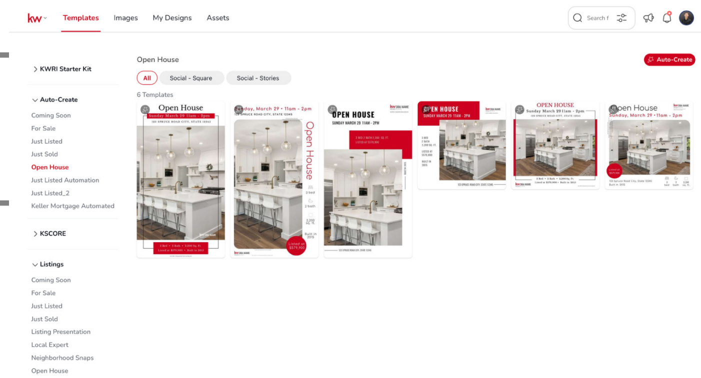
Join LABS today to help
guide our roadmap!

#15 CREATE MARKETING MATERIAL

Command's Designs applet allows agents to customize hundreds of social or print design templates. Preferred materials, DBA logo, headshot, & team images can be saved as custom assets. Select collections offer design automation. Choose open house collection, select listing, provide open house details, confirm agent info, and create six different templates automatically.

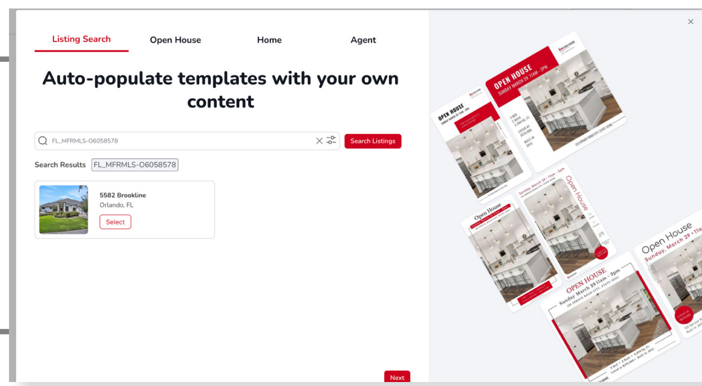
SELECT AUTOMATED COLLECTION

1. Browse automated collections on left menu
2. Choose "Auto-Create"



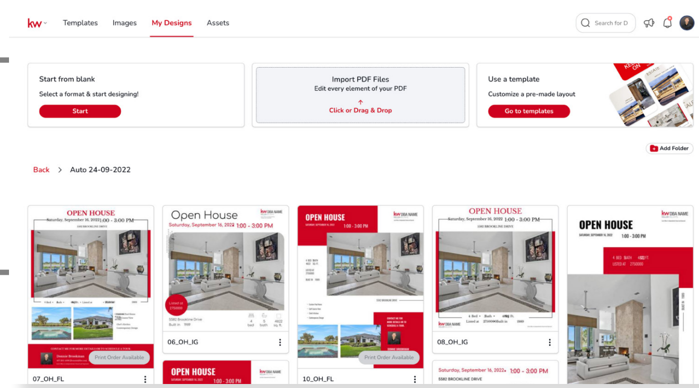
CONFIRM DETAILS

1. Search for Listing
2. Confirm Open House details
3. Confirm property details
   a. Brought in from MLS
4. Confirm Agent info



VIEW COMPLETED DESIGNS

1. All templates from collection will be added to folder
2. View, download, or save any template desired

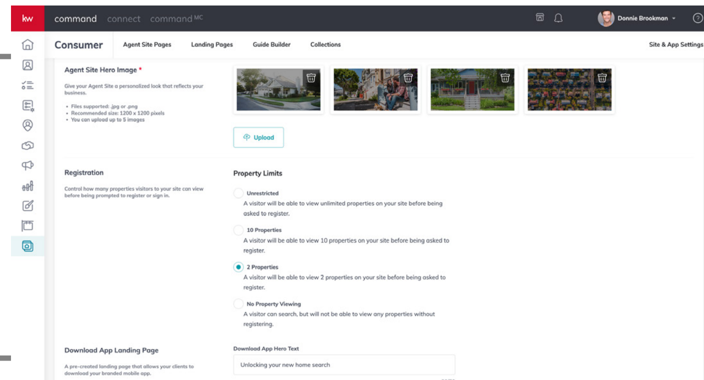


#16 CREATE SQUEEZE PAGES (FORCED REGISTRATION)

Agents can set required registration settings for their agent site based on the number of properties a consumer views. Options range from unrestricted to no property viewing. Visitors will be prompted to register or sign-in after hitting the property view limit set by the agent. Individual landing pages can be created through Command's Consumer applet with a variety of widgets.

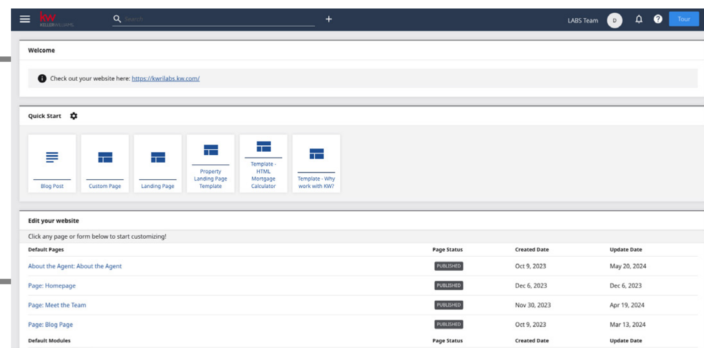
SET REGISTRATION SETTINGS

1. Open Command > Consumer
2. Select "Site & App Settings"
3. Select desired property limit
   a. Unrestricted, 10 properties, 2 properties, or no properties
4. Save settings



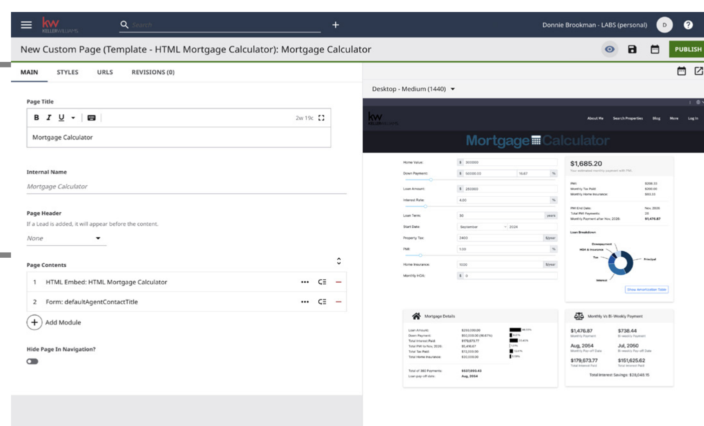
CREATE A LANDING PAGE

1. Open Command > Websites Applet
2. Choose "Edit my Site" > Expert Mode
3. Select Landing Page Template from Quick Start



CUSTOMIZE PAGE

1. Add desired widgets
2. Configure widgets
3. Save Landing Page or Publish Page



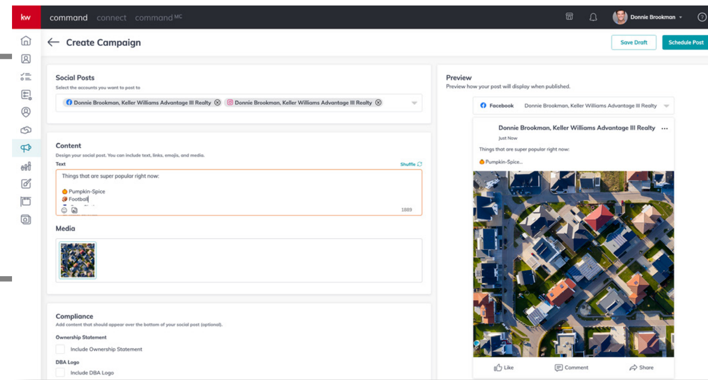
#17 USE MARKETING MATERIAL *(PRE-MADE)*

KELLERWILLIAMS

Command offers a variety of “ready to use” marketing pieces. HTML Email Templates, Social Media Posts, Direct Mail, & SmartPlans are some examples.

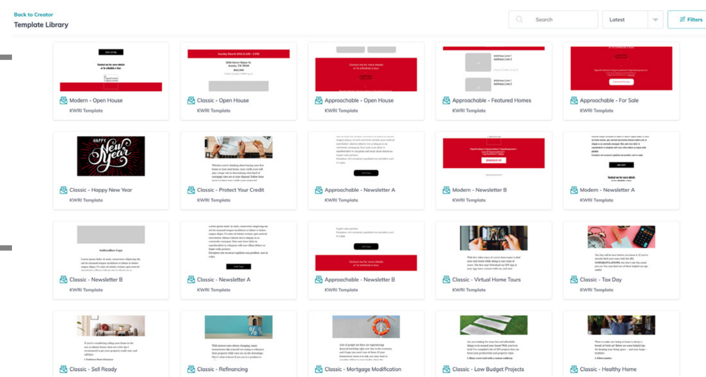
QUICK SOCIAL POSTS

1. Campaigns > Social Posts
2. Browse “Quick Posts” and use share button
3. Choose to publish immediately or schedule post



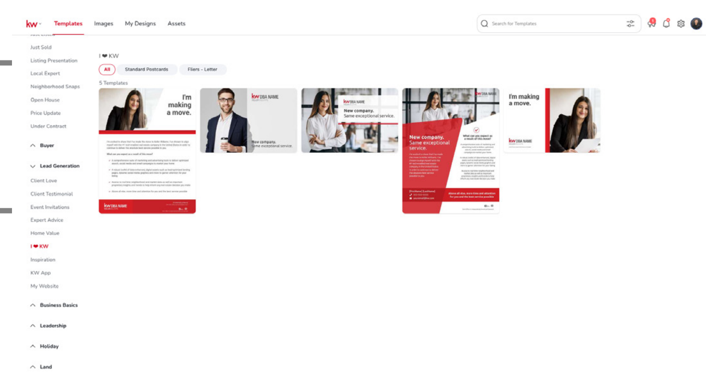
HTML EMAIL TEMPLATES

1. Campaigns > Email
2. Create Campaign > Email
3. Browse 70+ ready to use templates



POSTCARDS AND FLIERS

1. Designs > Create Design > Print
2. Lead Generation category > I ❤ KW



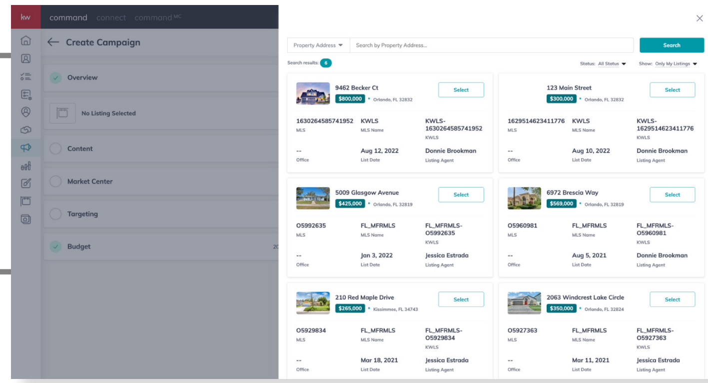
#18 SEND DIRECT MAIL

KELLERWILLIAMS

Agents can use the Campaigns applet to send direct mail campaigns. Agents can choose from auto-populating various templates with listing data or upload a custom post card. The Designs applet has several templates perfectly sized for the custom option. Detailed targeting options allow agents to narrow down the audience. Our partner (Real Mailers) will print, apply postage, and ship on behalf of agents fulfilling orders submitted prior to 3 p.m. the same day.

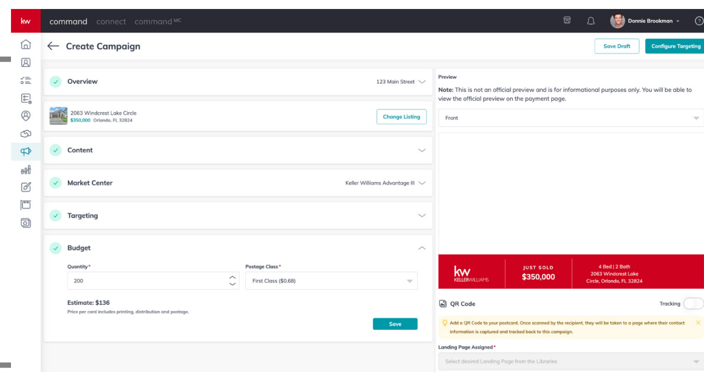
CREATE DIRECT MAIL CAMPAIGN

1. Campaigns > Create Campaign > Direct Mail
2. Choose Listing
   a. Images, Description, and property details will be used to auto-fill template



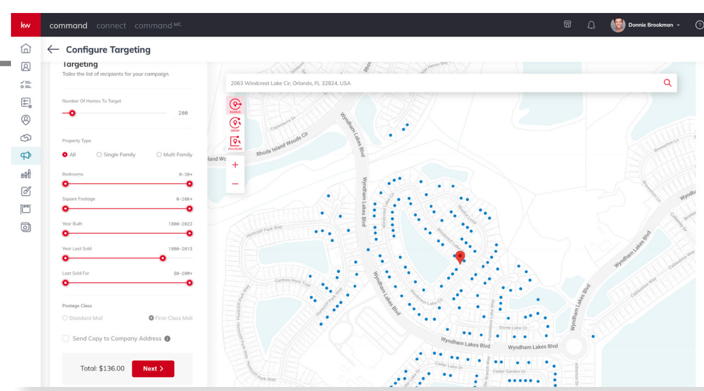
CUSTOMIZE CAMPAIGN

1. Confirm Content
   a. Template or Custom Design
   b. Listing Details (auto from MLS)
   c. Listing Photo
   d. Agent Details (auto from marketing profile)
2. "Configure Targeting"



CONFIGURE TARGETING

1. Adjust filters and map to find target audience
   a. # of Homes
   b. Bedrooms
   c. Square Footage
   d. Year Built
   e. Year last Sold
   f. Last Sold For
2. "Next" to confirm payment and begin processing

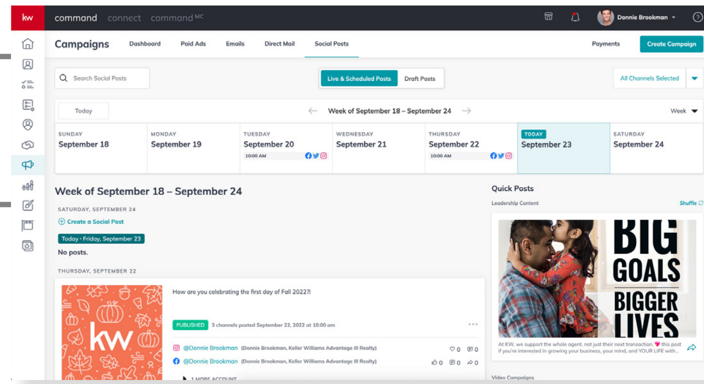


#19 POST TO SOCIAL MEDIA
FREE

Create and manage organic reach social media posts through Facebook, Twitter, or Instagram. Media can be uploaded directly from the agents computer or pulled from Designs. Agent's can share ready-to-go "Quick Posts" directly to social platforms with no required editing.

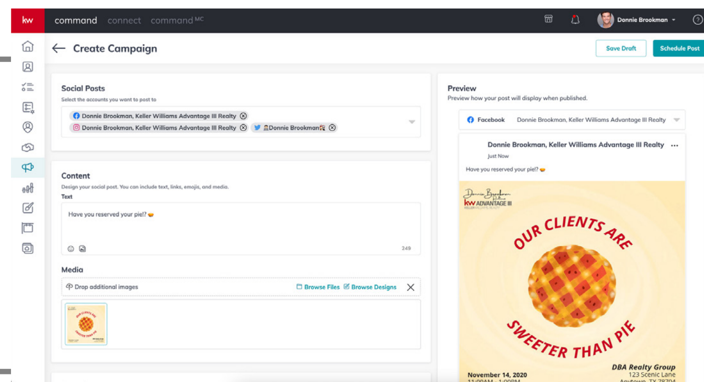
CREATE A SOCIAL POST

1. Click Create Campaign
2. Select Social Post



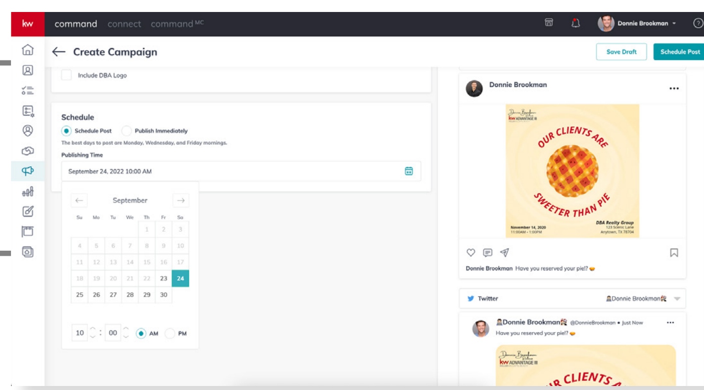
CUSTOMIZE POST

1. Choose Social Channel(s)
2. Write Text
3. Add Media
   a. Upload from computer
   b. Browse from Designs
4. Preview posts by Social Channel



SCHEDULE POST

1. Schedule post by date/time
2. OR Publish immediately
3. Confirm selection

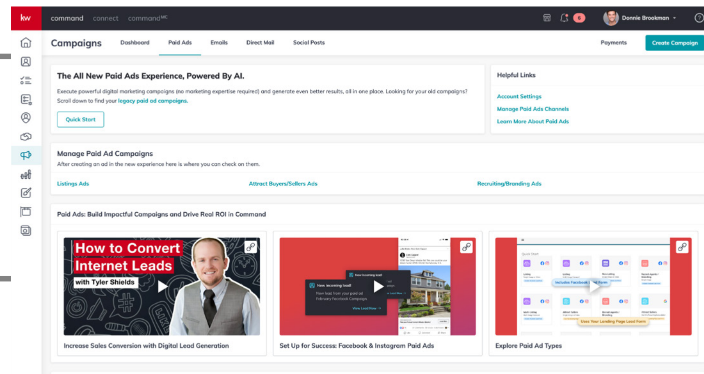


#20 RUN PAID SOCIAL MEDIA ADS

Agents can run paid ads through Command on Facebook, Instagram, and Google. Campaigns creates an easy button for agents to build a variety of ad types to both create awareness of their brand and generate new leads directly in their Contacts database. Lead settings allow the agent to tag and trigger SmartPlans to bring immediate follow-up automatically. Agents can choose listings to advertise and leverage AI to create ad copy easily. You should have proper consent to call/text any phone numbers you add and/or scrub the numbers against the Federal Do Not Call Registry and your internal Do Not Call list.

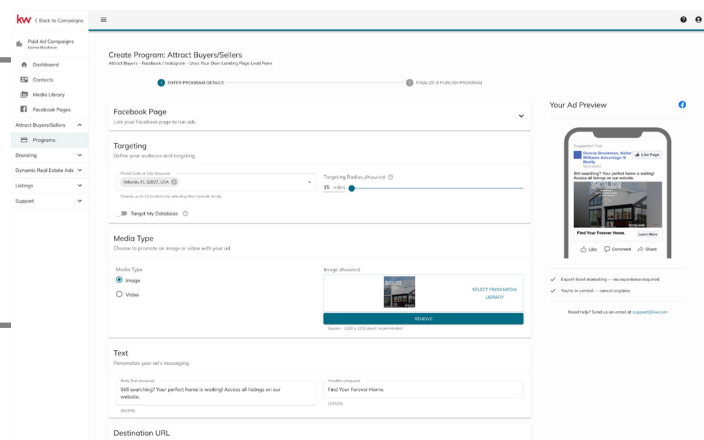
CREATE PAID AD

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



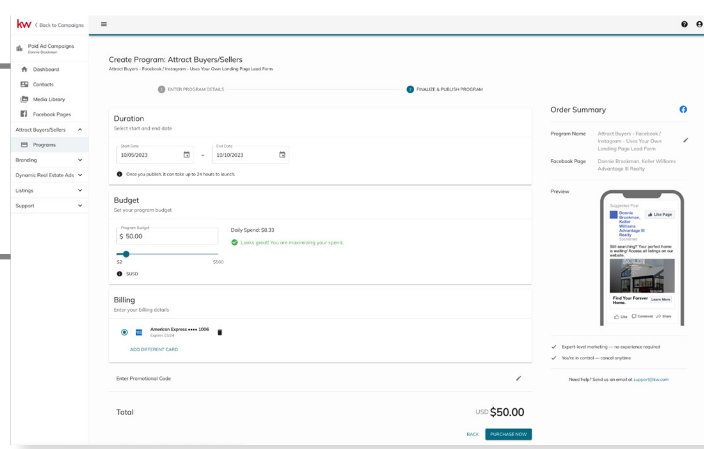
SELECT YOUR AD TYPE

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



LAUNCH YOUR AD

1. Review ad duration
2. Set ad budget
3. Confirm details and launch ad



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.

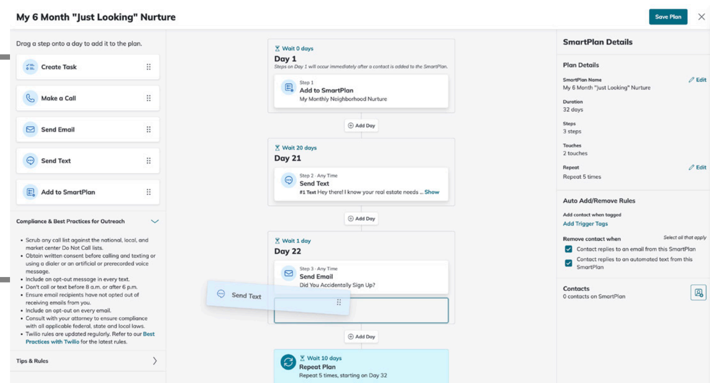
#21 CREATE FOLLOW-UP PLANS

Command's SmartPlans applet provides an extensive library of follow up plans and the ability to create a custom SmartPlan from scratch. Agents can choose to publish custom SmartPlans for all associates to access a copy. SmartPlan steps can be separated with time delays (days), be set to repeat, or trigger another SmartPlan. Custom tag triggers can be added to automate the activation of a SmartPlan. Stop calling/texting anyone who asks you to stop contacting them.

CREATE A SMARTPLAN

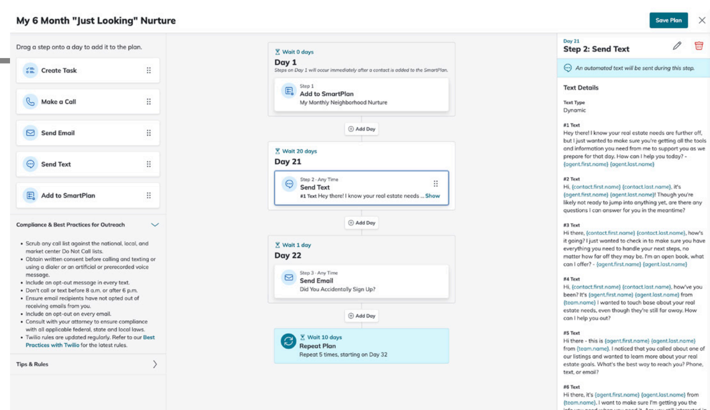
1. Open SmartPlans and choose "Create"
2. Add steps from the left to customize plan

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



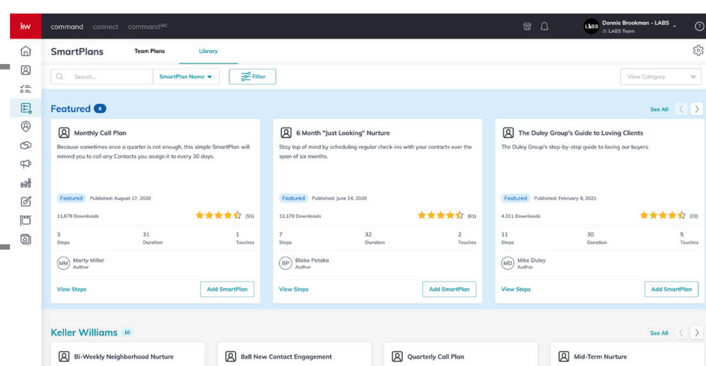
CUSTOMIZE STEPS

1. Select any SmartPlan step and customize it on the right side
   a. Email steps: Subject line, email text, time of day
   b. TCPA-compliant text messages: Task or automated, dynamic (multiple message for repeat steps) or static, time of day
   c. Tasks: Date created vs. date due, time of day



BROWSE SMARTPLAN LIBRARY

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



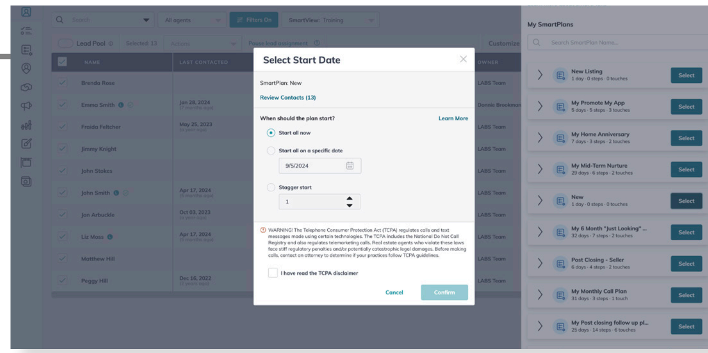
WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

#22 USE FOLLOW-UP PLANS

SmartPlans can be applied to contact records individually and in bulk through multiple paths. Options for scheduling the start date of the SmartPlan are available. Stagger start is optional when adding contacts to a SmartPlan in bulk. Stagger start helps manage the number of daily tasks/calls. SmartPlans can be triggered by adding a contact tag and individually set from the Command App. Stop calling/texting anyone who asks you to stop contacting them.

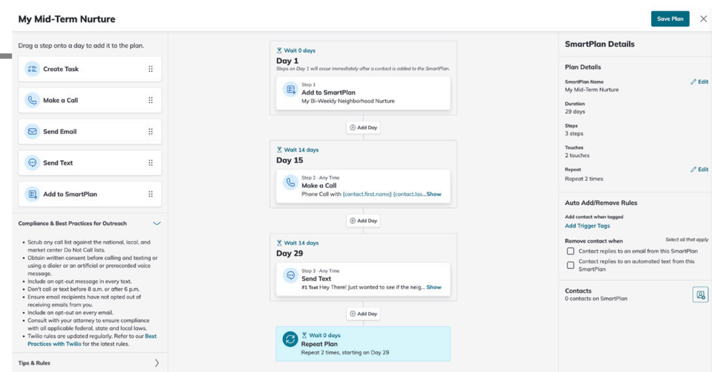
ADD TO SMARTPLAN (BULK)

1. Open Contacts and filter to desired list
2. Select contacts
3. Choose "Add to SmartPlan" from bulk action menu
4. Select SmartPlan
5. Choose Start immediately, schedule to start, or stagger start



AUTO ADD/REMOVE RULES

1. Navigate to the SmartPlans applet and edit desired SmartPlan
2. Under "Auto Add/Remove Rules" on the right:
   a. Include Contact Tags to trigger auto-starting a SmartPlan
   b. Automatically remove contact from SmartPlan when they reply (text, email, or both)

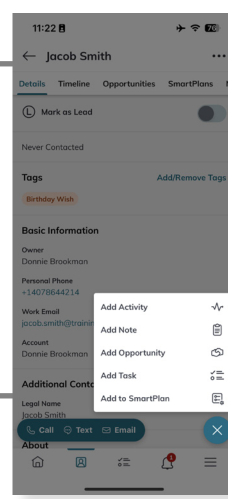


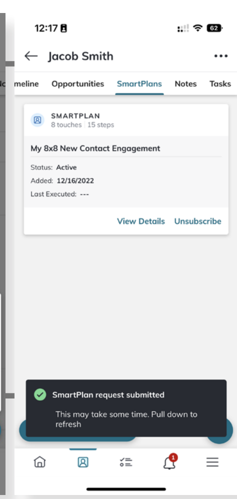
SMARTPLANS (COMMAND APP)

1. Open contact record
2. Select blue + button
3. Choose "Add to SmartPlan"

OR

1. Tap on "SmartPlans" tab
2. Choose blue + and select SmartPlan





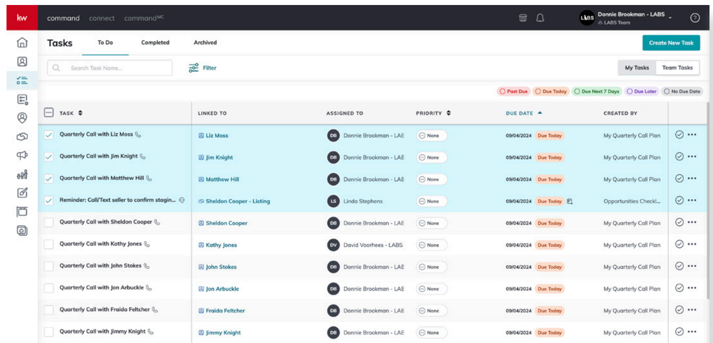
WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

#23 MANAGE DAILY TASKS

Command's tasks applet helps agents stay on top of daily tasks. Tasks can be related to a contact, opportunity (transaction), or general. Tasks created from SmartPlans and Opportunity checklist templates will appear in the tasks applet. Team rainmakers can manage tasks for themselves and team members. On the go, agents can quickly see what is due today, soon, or past due using the Command App. Tasks linked to an Opportunity (transaction) can have Smart Due Dates that will be dynamically updated based on details within the Opportunity.

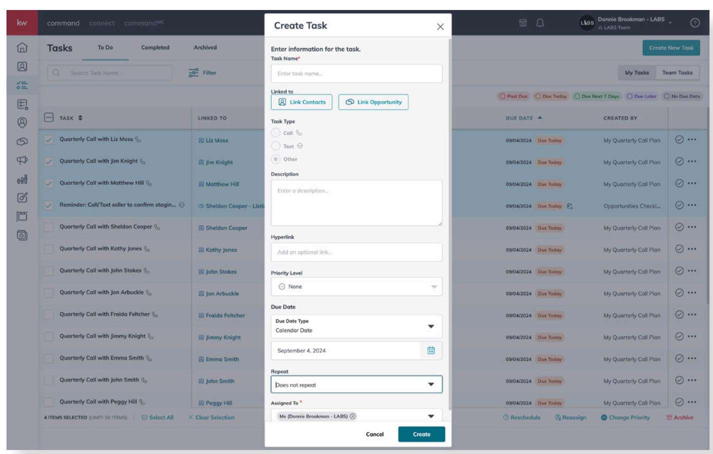
MANAGE DAILY TASKS

1. Open Command > Tasks applet
2. Select tasks on the left to complete a bulk action (reschedule, reassign (teams), change priority, or archive)
3. Click checkmark on the right to mark a task complete
4. Filter by due date, repeating tasks, priority, task type, task linked, assignee, or created by



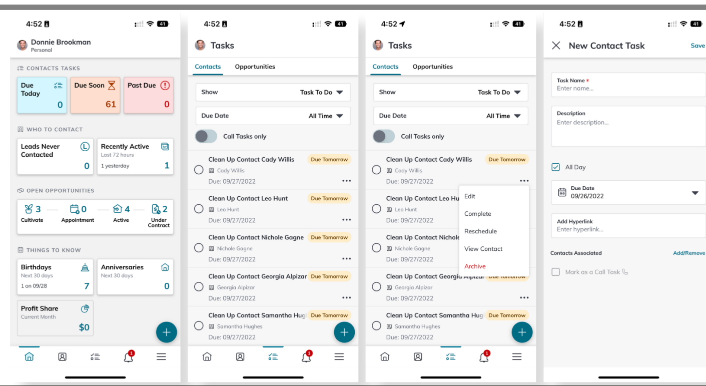
CREATE A NEW TASK

1. Tap "Create New Task" in the top right
2. Link Contacts or Opportunities (Optional)
3. Complete task details
4. Set Due Date
   a. Calendar Date
   b. Tasked linked to an Opportunity will have the option of on, before, or after a Smart Due Date. Smart Due Dates are dynamically set based on details from the Opportunity (transaction)
5. Repeat
   a. Daily, Weekly, Monthly, Yearly, or Custom



MANAGE DAILY TASKS (COMMAND APP)

1. View Due Today, Soon, and Past due on dashboard
2. Click tasks applet to filter specific tasks by status or due date
3. Use menu to edit, complete, reschedule, or display associated contact
4. Use blue + to create new task



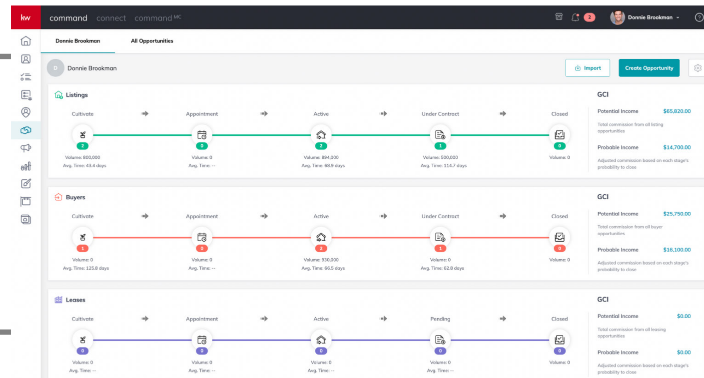
#24 CREATE WORKFLOWS AND PROCESSES

Agents can create custom workflows and checklists for Opportunities (transactions) to track on their Sales Pipeline. Checklist can be managed from a template level and included in a Client Update. Client updates can be turned on for each opportunity (optional) to send a daily summary of items completed to customer(s).

VIEW SALES PIPELINE

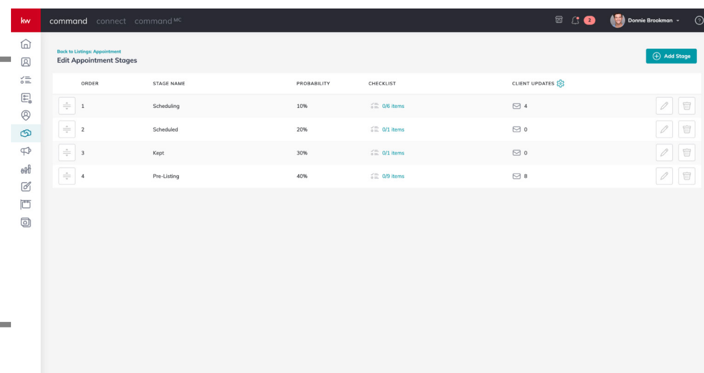
1. Open Opportunities applet

This pipeline is broken down into five phases for Listings, Buyers, and Leases. Agents can visually track their business. Each phase can have custom stages to track in more detail.



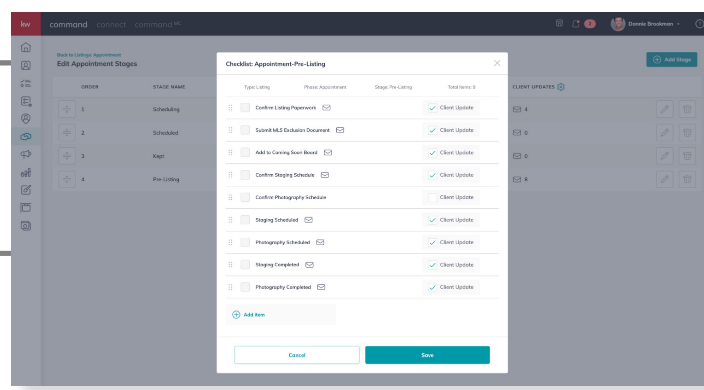
ADD / EDIT STAGES

1. "Add New" stage in top right
2. Edit name
3. Edit probability to help forecast GCI (conversion rate)
4. Edit checklist templates



EDIT CHECKLIST TEMPLATE

1. Add item
2. Include in Client Update (optional)
3. Save changes

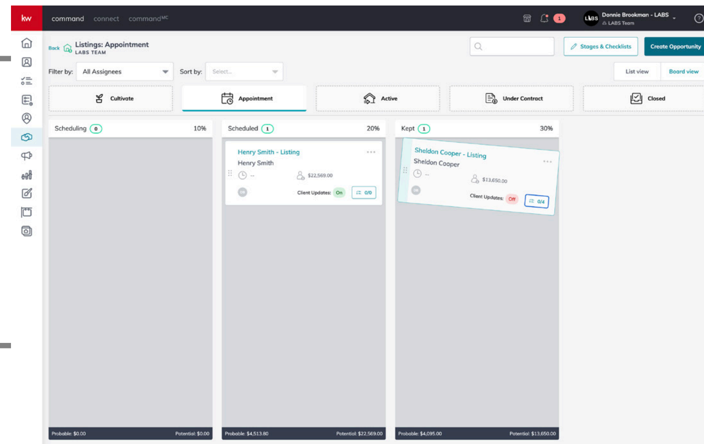


#25 USE WORKFLOWS AND PROCESSES

As an agent moves the Opportunity through the stages and phases of their sales pipeline, checklist templates can be applied. Assign due dates for tasks to populate in the Tasks applet on desktop and in the Command App. Teams can assign these tasks to various members to leverage the work.

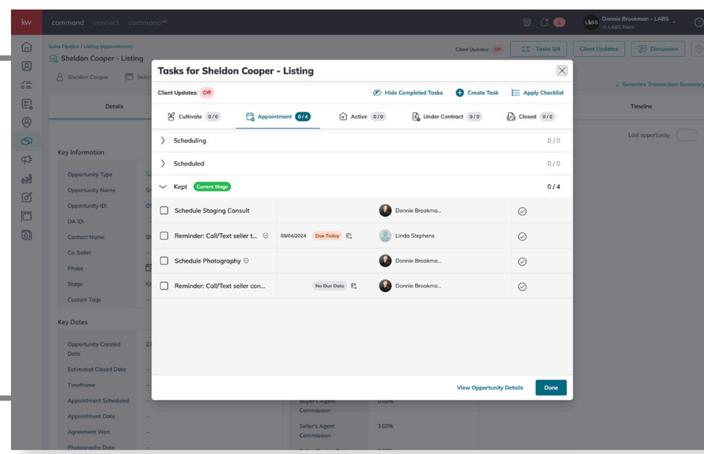
PIPELINE MANAGEMENT

1. Open Command > Opportunities
2. “Create Opportunity” to represent potential transactions on your pipeline
3. Drag and drop to move the Opportunity through the phases and stages of your pipeline



CHECKLIST TEMPLATES

1. Open the desired Opportunity
2. Click on Tasks in top right corner
3. Choose “Apply Checklist” and select checklist template
4. Use “Create Task” for one-off items not in your checklist template

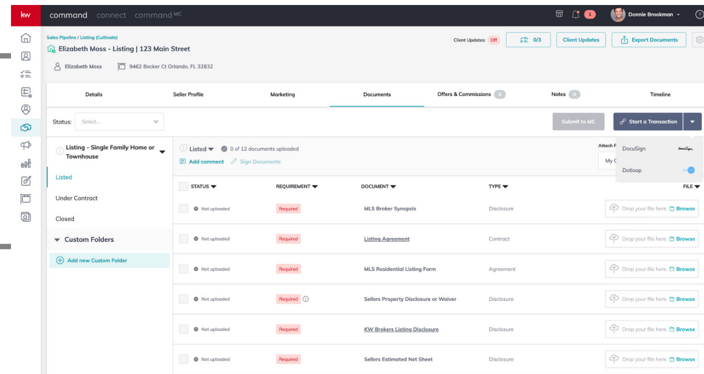


#26 PREPARE AGREEMENTS

Command offers integrations with DocuSign and Dotloop to easily prepare agreements. This connected DocuSign Room/ Transaction Loop will remain attached to the Opportunity to streamline compliance and document storage in the agent's preferred partner. Transaction details are sent to respective platform to help auto-fill documents. Opportunities is also connected to CommandMC > Opportunities for compliance and commission approvals.

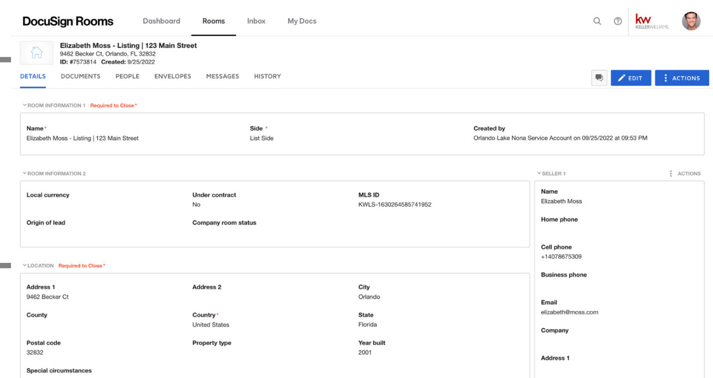
START A TRANSACTION

1. Opportunities > Create Opportunity
2. Documents Tab > Start a Transaction
3. DocuSign or Dotloop - agent's choice



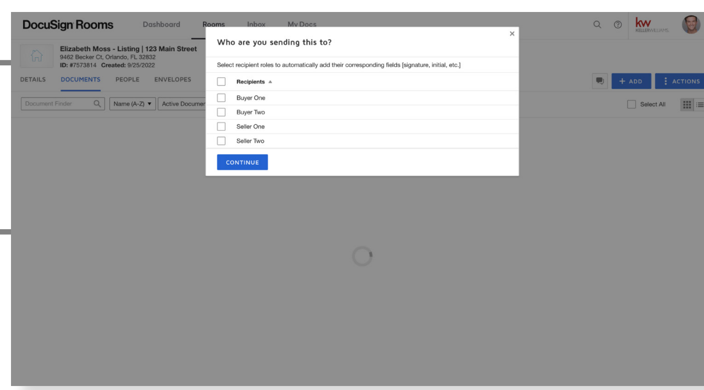
SYNCING DETAILS

1. Command will sync Opportunity details to help auto-populate agreements
   a. Name(s), Email(s), Agent(s), Address, Price, Legal Description (MLS)



AGREEMENT AUTO-FILL

1. DocuSign Forms will map respect details and assign (initials/signatures) recipients with contact name/email

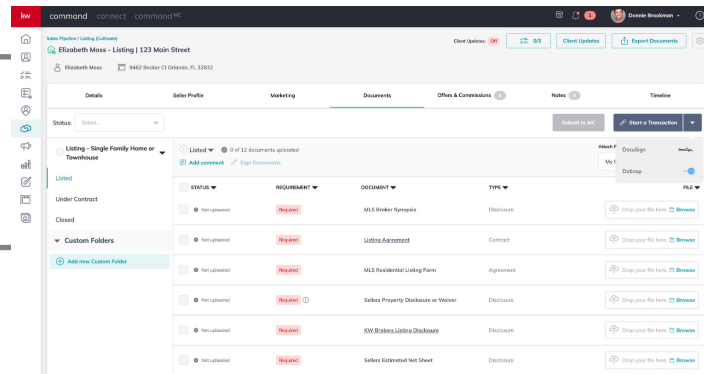


#27 WRITE CONTRACTS

Command offers integrations with DocuSign and Dotloop to easily prepare agreements. This connected DocuSign Room/ Transaction Loop will remain attached to the Opportunity to streamline compliance and document storage in the agent's preferred partner. Transaction details are sent to respective platform to help auto-fill documents. Opportunities is also connected to CommandMC > Opportunities for compliance and commission approvals.

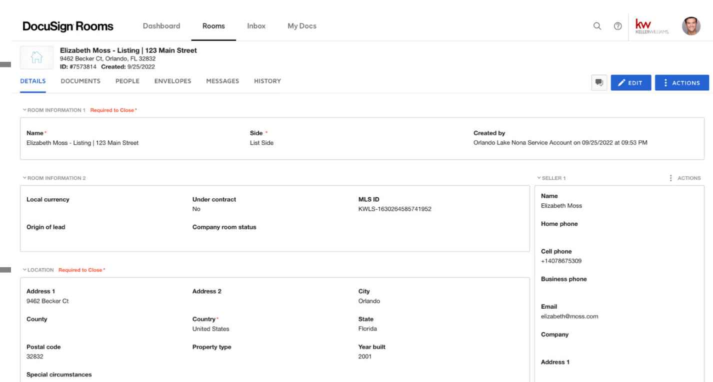
START A TRANSACTION

1. Opportunities > Create Opportunity
2. Documents Tab > Start a Transaction
3. DocuSign or Dotloop - agent's choice



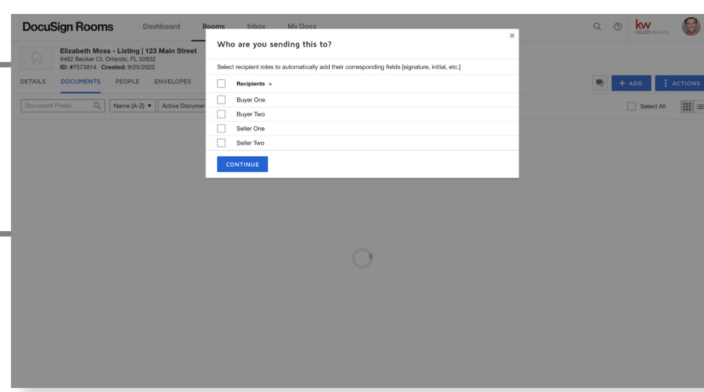
SYNCING DETAILS

1. Command will sync Opportunity details to help auto-populate agreements
   a. Name(s), Email(s), Agent(s), Address, Price, Legal Description (MLS)



AGREEMENT AUTO-FILL

1. DocuSign Forms will map respect details and assign (initials/signatures) recipients with contact name/email



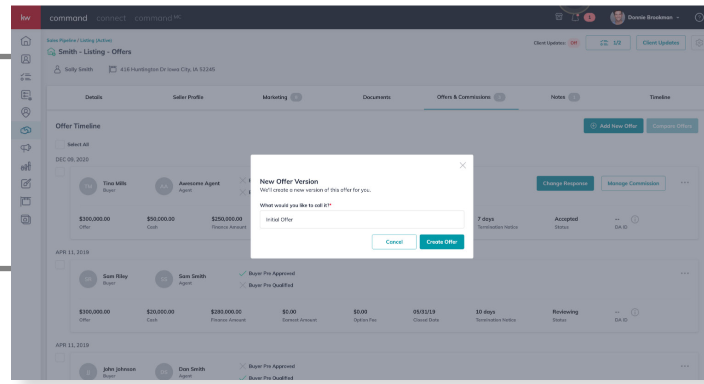
#28 COMPARE OFFERS

KELLERWILLIAMS

Opportunities in Command allows agents to add and track multiple offers. The Offer Comparison can be downloaded as a PDF or emailed to seller(s). Offers initiate the commission workflow.

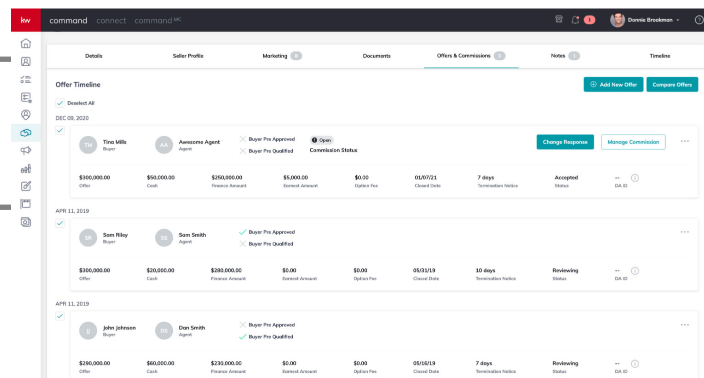
ADD NEW OFFER

1. Opportunities > Opportunity record > Offers & Commissions tab
2. Choose "+ Add New Offer" Name the offer and add details



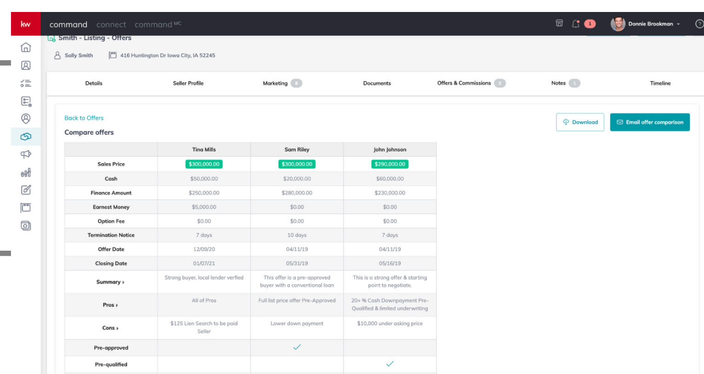
VIEW ALL OFFERS

1. View and select multiple offers
2. Choose "Compare Offers"



VIEW OFFER COMPARISON

1. Preview offer comparison
2. Download PDF offer comparison (optional)
3. Email offer comparison to seller(s) (optional)

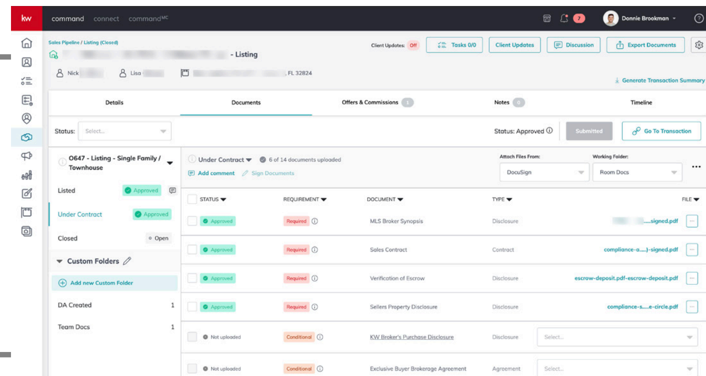


#29 SUBMIT FOR COMPLIANCE

Command provides a collaborative workspace between Agents and MC Leadership to manage transaction compliance approvals. Agents can attach documents from multiple sources to organized checklists created by their MC. Documents can be required, continually required, or optional. The compliance tool includes a built in PDF merge/split, secure document export, and instant messenger options for teammates + MC leadership.

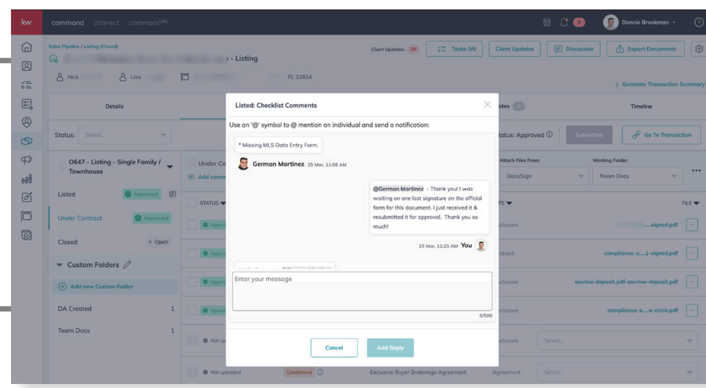
ATTACH FILES AND SUBMIT

1. Review required, conditional, and optional documents as chosen by MC
2. Attach files to compliance checklist from DocuSign/Dotloop or computer
3. Submit for approval
4. Monitor notifications for updates



MESSAGE MC LEADERSHIP

1. Open comment section of compliance folder with message icon
2. Compose and send messages
   a. Use @ to mention/notify individual Team members and MC leadership



SPLIT AND ATTACH PAGES

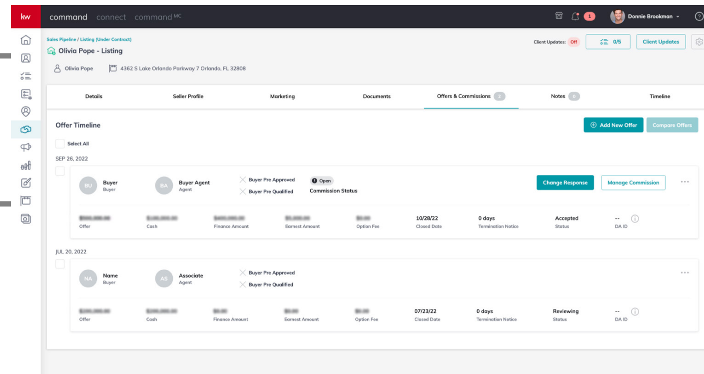
1. Open Split and Attach feature
2. Select or upload document(s)
3. Split/Attach pages as needed

#30 SUBMIT FOR COMMISSIONS

Accepting an offer for an Opportunity will provide agents the ability to manage and submit commission requests. Add other brokers/agents (if applicable), team members internally, deductions, inside/outside referrals, and track your cap status. Notes to the commission approver can be added prior to submitting. Commissions are reviewed by Market Center Leaders and processed as part of the Transaction within CommandMC.

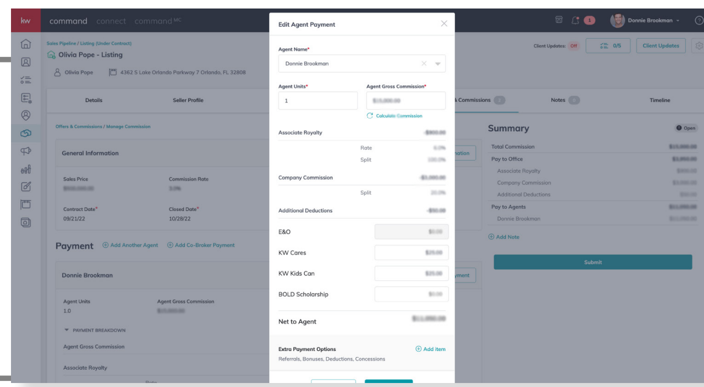
MANAGE COMMISSION

1. Add and accept desired offer
2. Select “manage commission”



ADJUST COMMISSION DETAILS

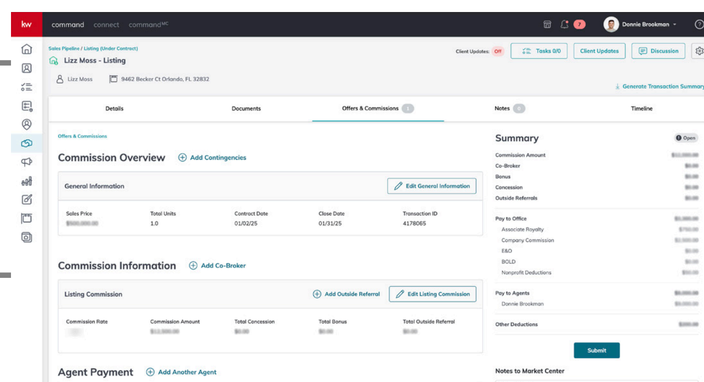
1. Edit agent payment details
2. Add an agent (optional)
3. Add other side’s broker/agent (optional)
4. Track cap status
5. View 1099 income details
6. Submit for approval



RECEIVE DA

1. MC Leadership can optionally share the Disbursement Authorization for agent to be paid at table with chat notification.

**Where allowed by broker*



Commissions are not set by law or practice and are fully negotiable. There is no commission standard and pricing will vary by agent and market conditions. KWRI does not determine commissions and plays no role in establishing commissions.

#31 COMMUNICATE WITH VENDORS

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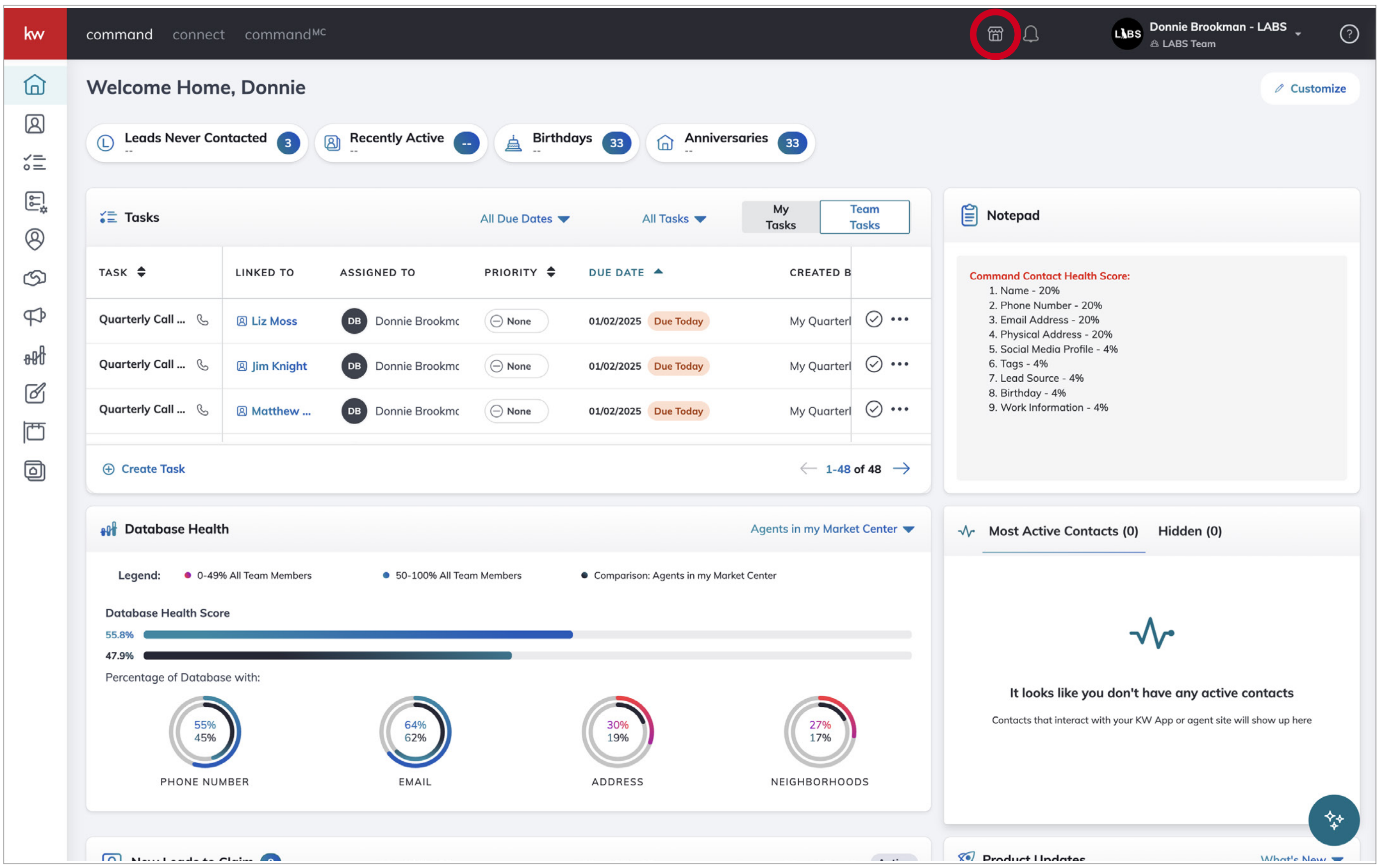

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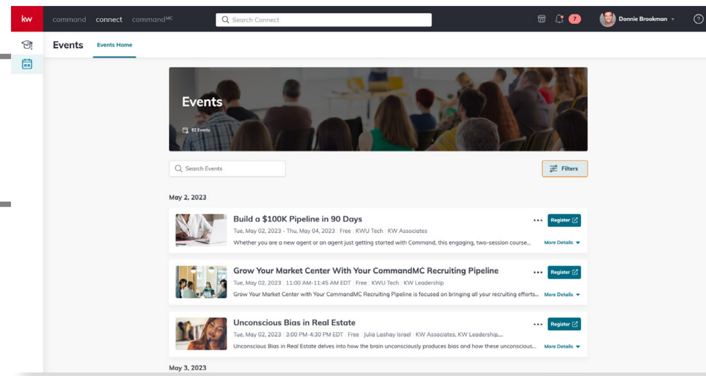
Join LABS today to help guide our roadmap!

#32 REGISTER FOR CLASSES

KWU's Tech Training Team offers a variety of training options for agents, operations, and leaders to engage with Command.

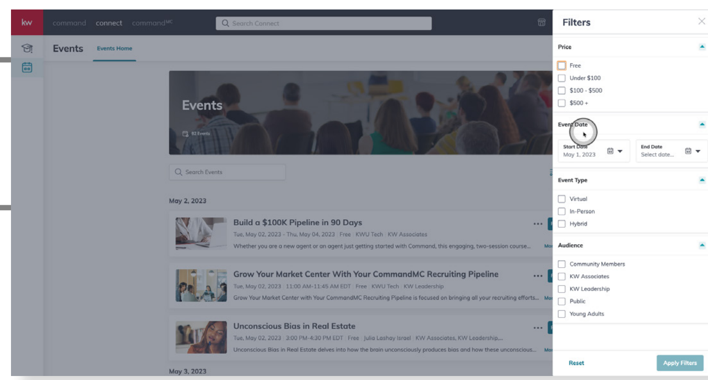
REGISTER FOR CLASSES

1. Click "Connect" tab
2. Select "Events" applet



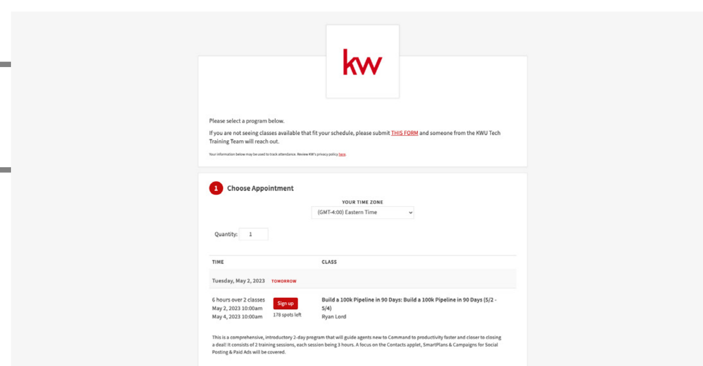
CONFIRM DETAILS AND REGISTER

1. Search or Filter events (optional)
2. Click "Register"



COMPLETE REGISTRATION

1. Confirm details and complete registration

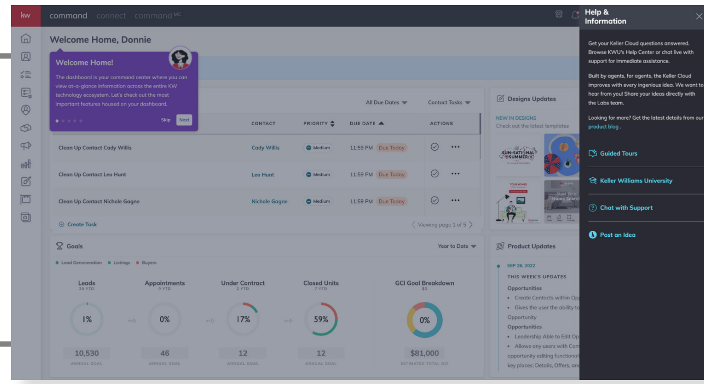


#33 ATTEND CLASSES/ LEARNING

Agents can access guided tours, KWU articles with step-by-step instructions, or browse self-guided learning paths. Guided tours are built by applet/experience and will guide an agent directly in Command. Our knowledge base at **answers.kw.com** has an extensive library of how-tos and step-by-step instructions for all things KW tech. KW Connect offers self-guided learning paths helping to connect the “why” behind our suite of technology tools.

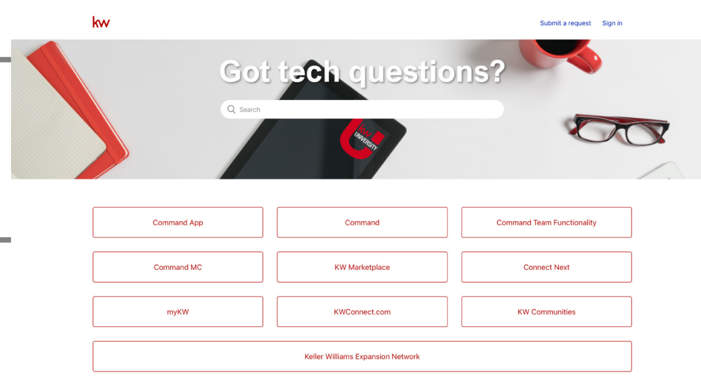
ACCESS LEARNING CONTENT

1. Open ? menu from top right
2. Select Guided Tours
   a. Guided tours will appear as purple bubbles and walk agent through using tool
3. Select Keller Williams University



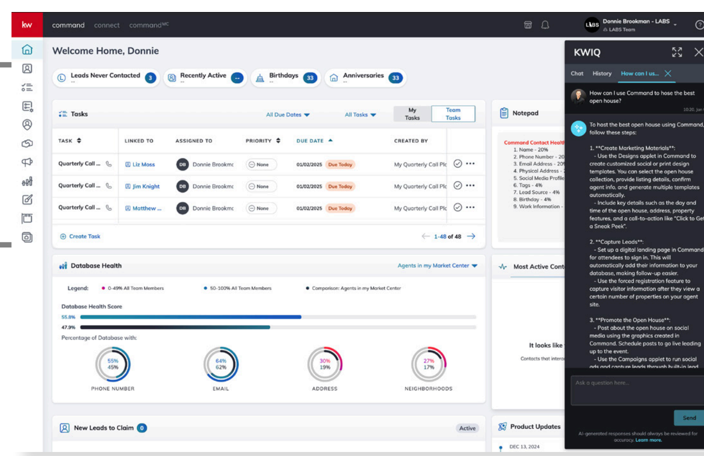
KW UNIVERSITY

1. Directly access **answers.kw.com**
2. Detailed articles with step-by-step instructions for all things Command



KWIQ

1. Open KWIQ on the Dashboard of Command
2. Ask any question related to Command or your Real Estate Business

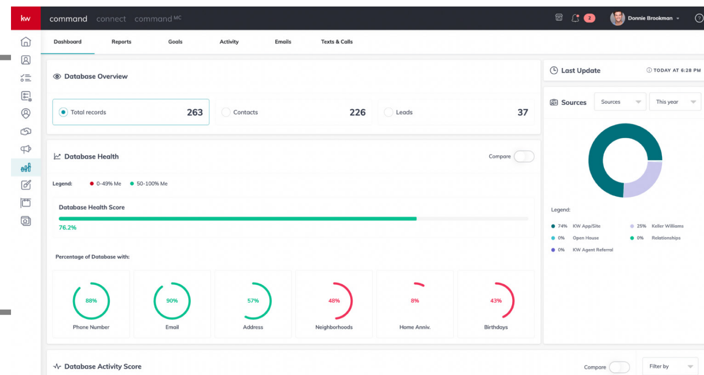


#34 TRACK LEAD GEN ACTIVITIES

Agents can track their lead generation activities in two ways using Command. First, the reports applet will display contact health score and logged activities like calls, texts, or meetings. Agents can also turn on Activity Tracker. This will send a daily reminder based on the desired schedule (off days/holidays) to log daily activities and mood. Rainmakers can view this at a team level.

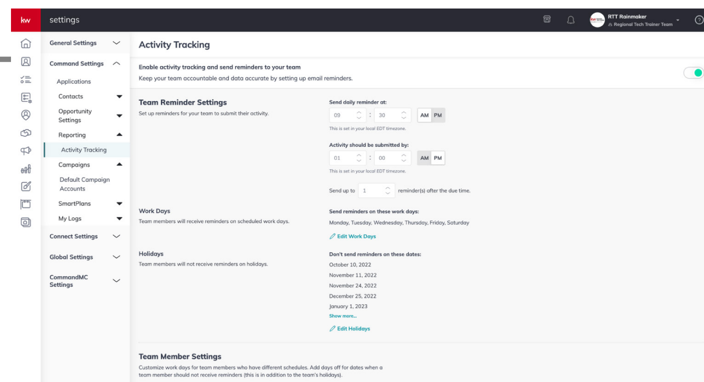
LEAD GEN REPORTS

1. Open the reports applet
2. See database overview and last contacted on dashboard
3. Look on the “Reports” tab for a more detailed database report



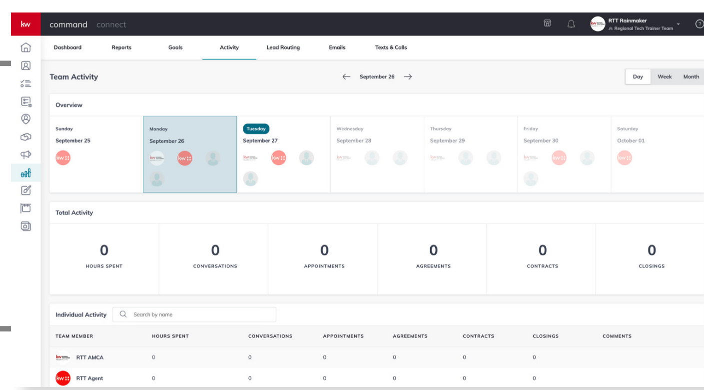
SET ACTIVITY TRACKING

1. Open Settings > Command > Reports > Activity Tracker
2. Schedule daily emails and desired reminders
3. Select default work days
4. Select holidays
5. Scroll and set agent specific days/holidays (teams only)



VIEW ACTIVITY TRACKING

1. Open Reports and Activity tab
2. See profile photos for all submitted activity each day of current week
3. View Summary of total team activity
4. View breakdown of activity by team member



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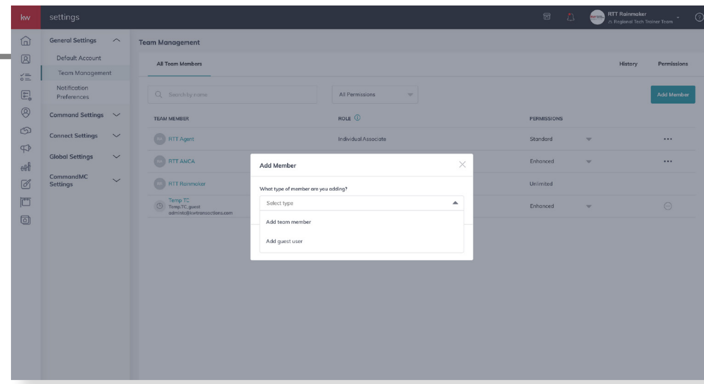
#AA1 CREATE ADDITIONAL USER

The initial request to add a user for KW Command will start with Market Center Leadership. Team accounts can be created to support Solo Agent + Admin(s), Teams + Admin(s), & Groups + Admin(s). Users will be considered KW® associates and have full profiles. Guest Users are available for non-associate accounts and limited at 2 per organization. Guest Users can be denied/removed by MC leadership, if needed.

ADD MEMBER

1. Open Command > Settings > Team Management
2. Choose “Add Member”
3. Select option
   a. Team Member (KW® Associate)
   b. Guest User (not KW® Associate) - great for VA

No team management? Talk to your MCA.

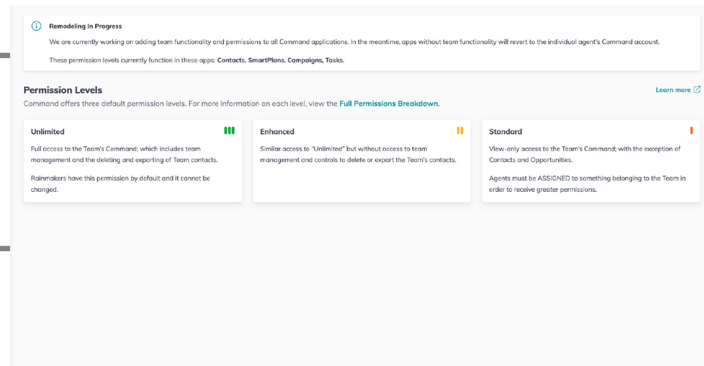


#AA2 GRANT PERMISSIONS

KW Command offers three levels of permissions for team members. Initial permission settings will be set by the members role assigned by MC leadership. Rainmakers will default to Unlimited and be able to adjust permission settings for all team members. Standard is recommended for agent team members, enhanced is recommended for administrators, and unlimited is recommended for team owners.

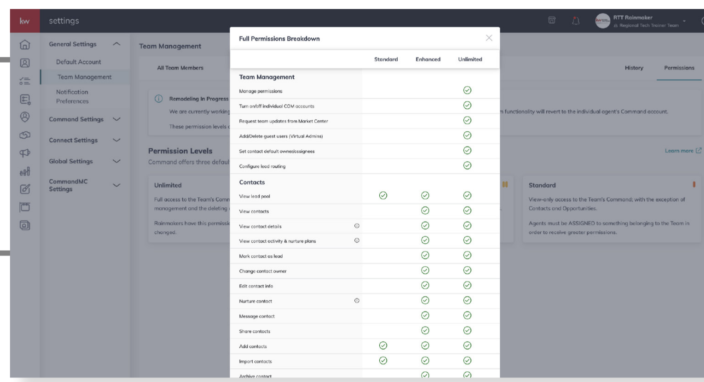
TEAM MANAGEMENT

Here are short descriptions of the three permission levels: Standard, Enhanced, and Unlimited.



FULL PERMISSIONS BREAKDOWN

View the full permissions breakdown for each applet and feature by Standard, Enhanced, and Unlimited



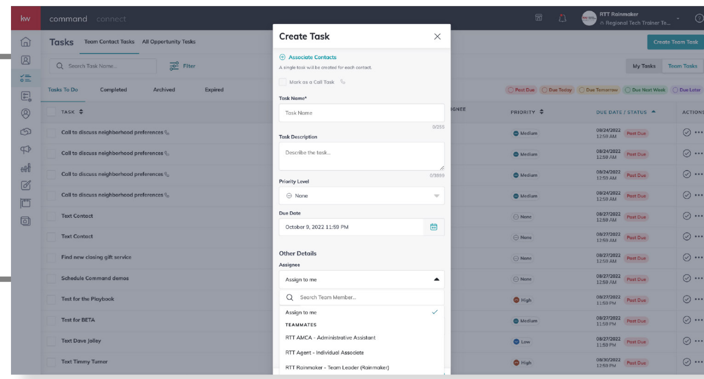
#AA3 DELEGATE TASKS

KELLERWILLIAMS.

Tasks that are associated with contact records, transaction records, or independent can be assigned/reassigned to any team member in Command individually or in bulk. Tasks populated on an Opportunity (transaction) checklist can be assigned to any team member.

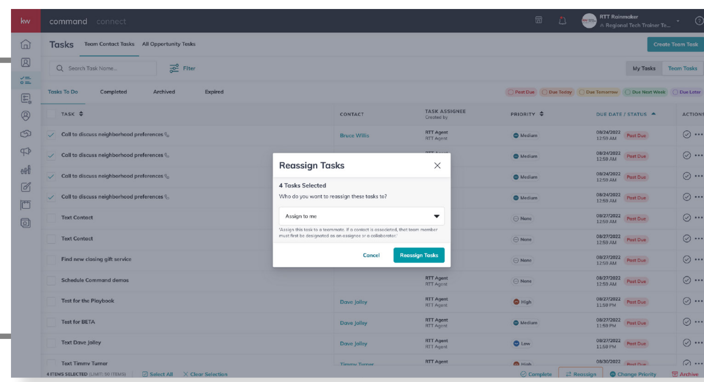
ASSIGN TASKS

1. Open Command > Tasks
2. Click "Create Team Task"
3. Use "Assignee" option to select another team member



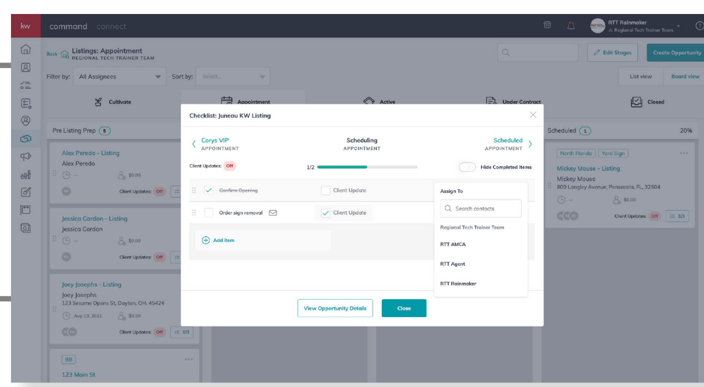
BULK REASSIGN

1. Open Command > Tasks
2. Select desired tasks
3. Choose "Reassign" bulk action
4. Select team member using dropdown
5. Confirm with "Reassign Tasks"



ASSIGN OPPORTUNITY TASKS

1. Open Command > Opportunities
2. Select opportunity task list
3. Choose "Assign To"
4. Search or select team member to assign

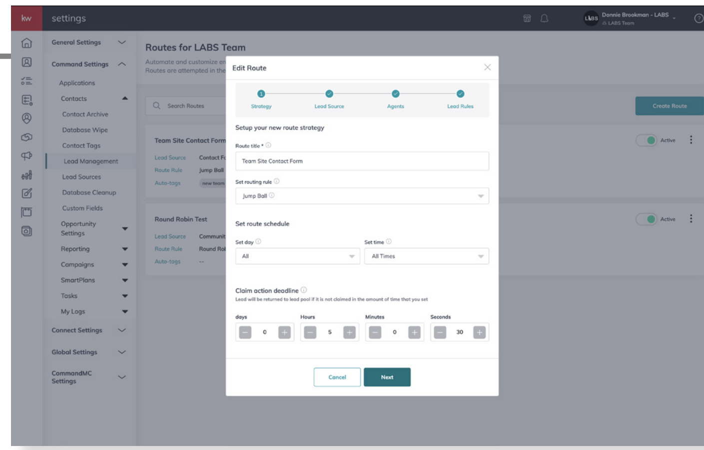


#T1 ROUTE LEADS

Agents can set up multiple lead routes to accommodate a variety of lead sources, rules, & schedules. Create and prioritize routes by the desired schedule using one of five rules available. Set the claim action deadline to increase your speed to lead. Routes can include all or a selection of agents. You should have proper consent to call/text any phone numbers you add and/or scrub the numbers against the Federal Do Not Call Registry and your internal Do Not Call list.

CREATE LEAD ROUTE

1. Open Command > Settings > Contacts > Lead Management
2. Select "Create Route"
3. Add title and set routing rule
4. Set route schedule
   a. Day of week and times
5. Set claim action deadline
   a. Days, hours, minutes, seconds
6. Select lead source(s)
7. Select agent(s)
8. Apply Lead Rules (optional)
   a. Auto-tag or trigger SmartPlan



RULES

Random - randomly distributes leads to each team member included in the route. Every agent has an equal chance of getting the lead, but no agent will be the first person to get a lead, twice in a row.

Weighted Random - create a lead distribution ratio between team members, ensuring that some agents get more leads than others. Later in the process, you will give each team member, included in the route, a percentage amount that will cumulatively equal 100%. These percentages are calculated as probabilities for leads to be randomly distributed to these agents.

Jump Ball - every team member in the lead route will receive the lead. The first person to claim it, gets it.

Round Robin - sends leads to agents in an ordered list. If an agent doesn't claim the lead in the allotted time, it will go to the next agent on the list. If none of the agents claim the lead, it will be sent to the Lead Pool.

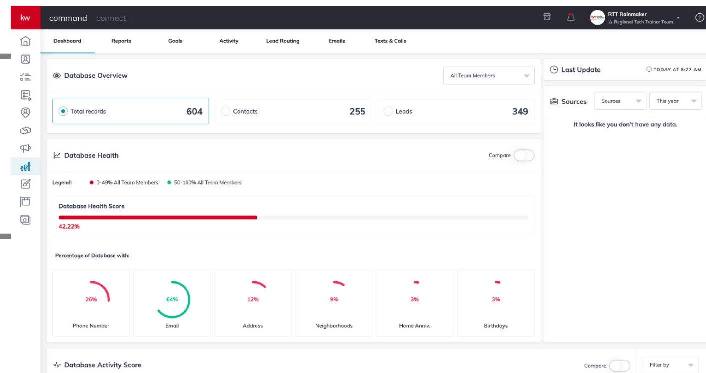
Assign to Agent - you will set one agent, from your team, on this route. All leads from the lead sources in the route, will be automatically assigned to this agent, without them having to claim them. This route will override any other lead routes that contain the same lead sources and date/time designation.

#T2 REPORTING FOR AGENTS

Command offerings reporting for agents around database health, opportunities (transactions), goals, emails, and texts/calls (Twilio).

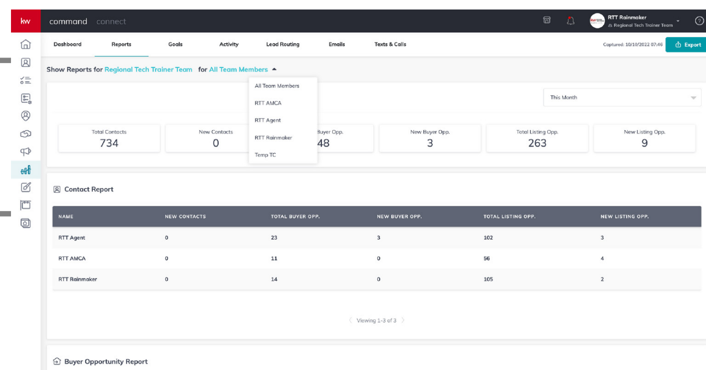
ACCESS REPORTS

1. Open Command > Reports
2. View Dashboard or switch reporting type with tabs at top



REPORTING BY TEAM/AGENT

Use dropdown to alternate between team or individual agent reports.



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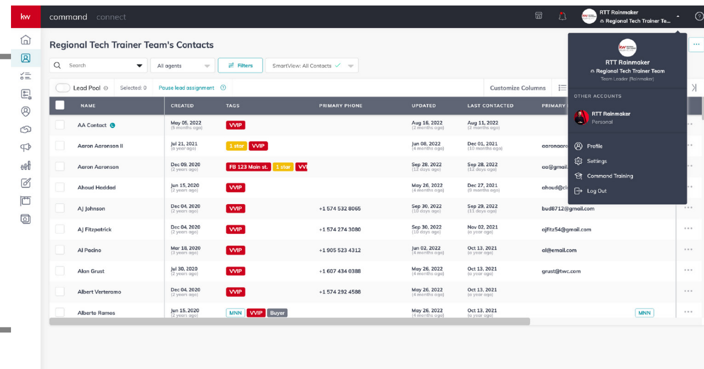
#E1 DATABASE VISIBILITY ACROSS MARKET CENTER/STATE AND NATIONAL BOUNDARIES

Rainmakers or admin from Expansion organizations can be added to spoke locations if MC permits. This would provide visibility into the team accounts, database, pipelines, and reporting. The view would not be a combined view.

VIEW TEAM ACCOUNT DATABASE

This current view is of the team database. Additional team locations will be included in this dropdown under “Other Accounts” if available. A team account will represent each additional spoke location.



#E2 COMBINED REPORTING/TRACKING

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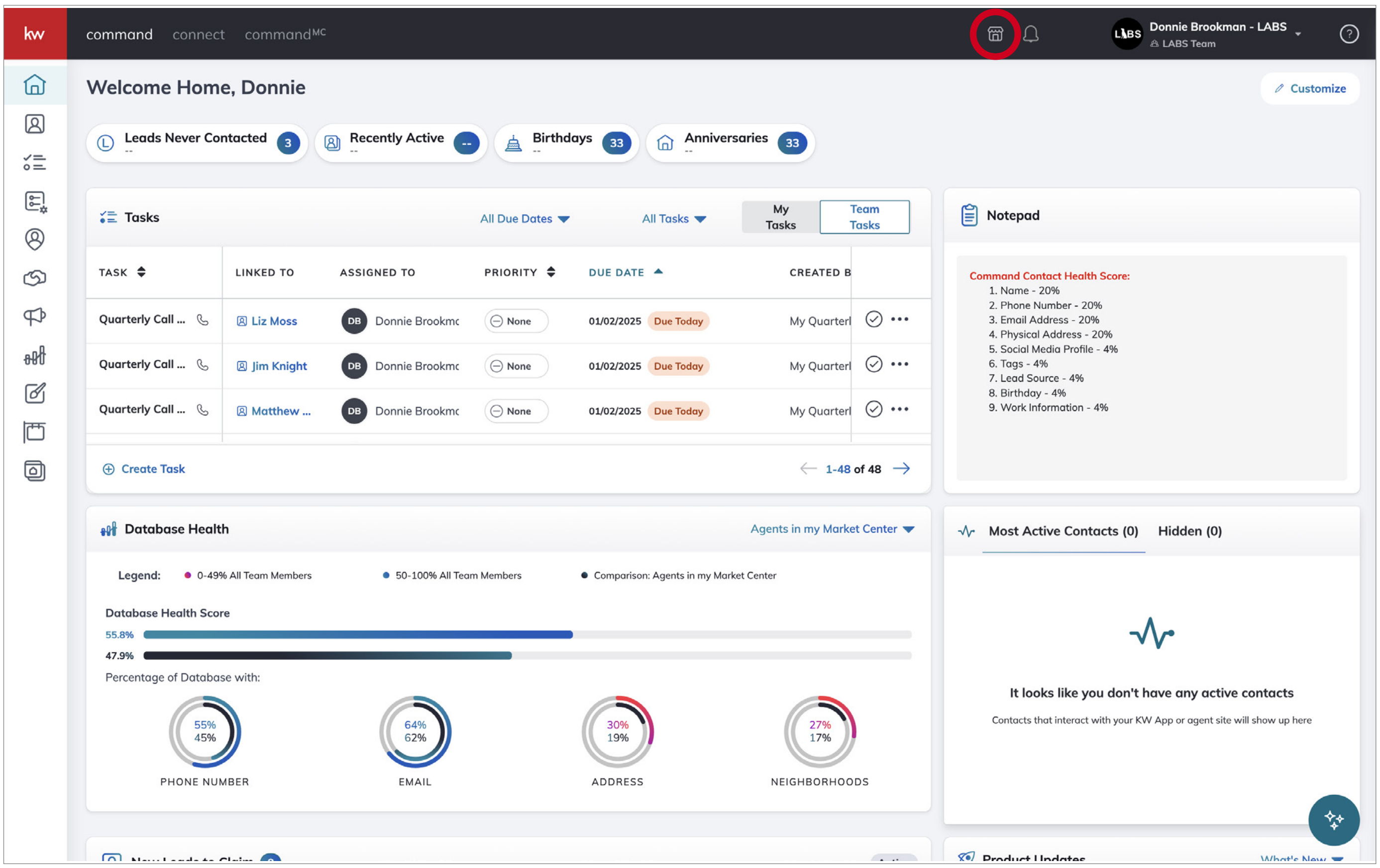

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#E3 ROUTE LEADS ACROSS TEAMS

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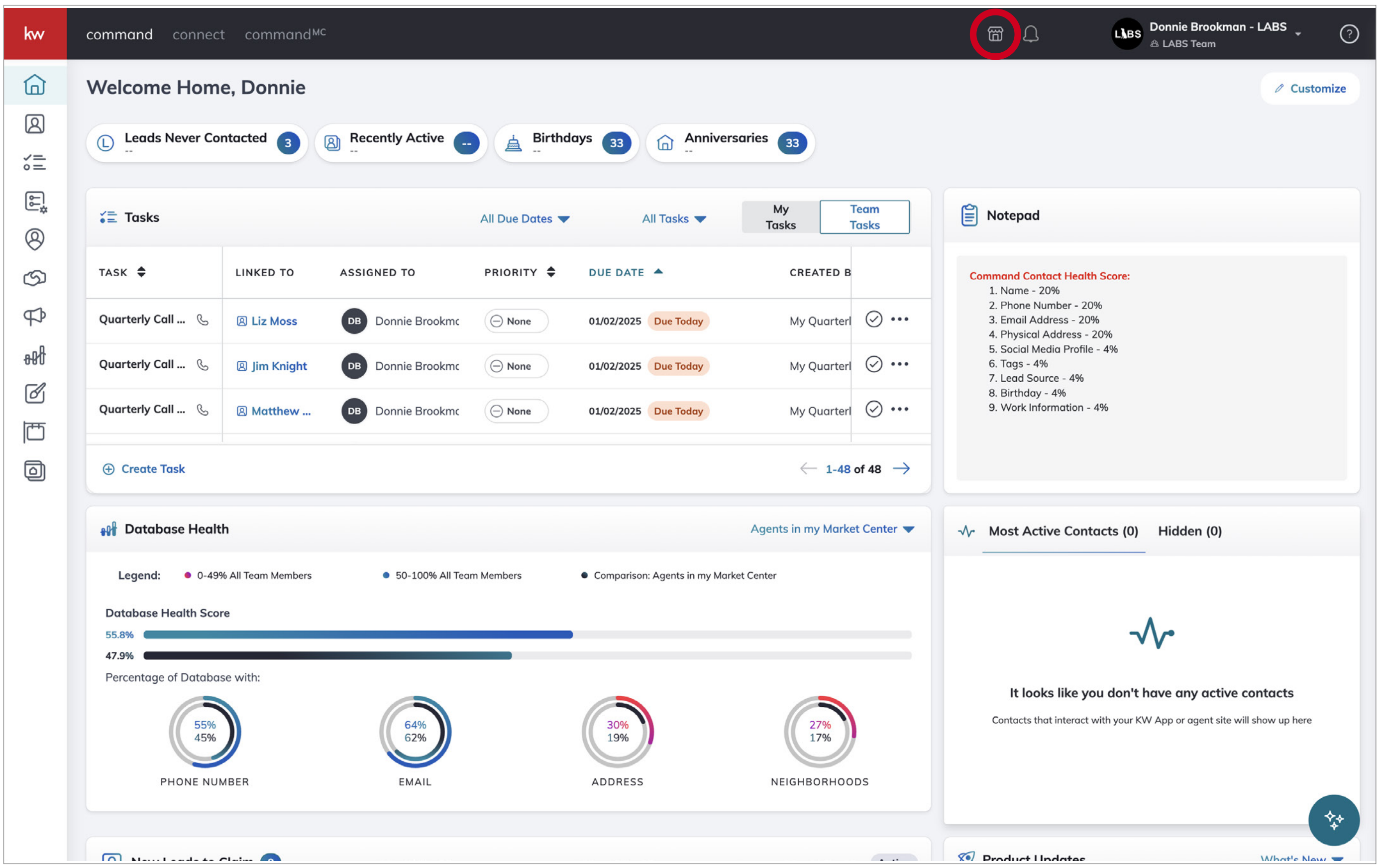

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#E4 DELEGATE TASKS ACROSS TEAMS

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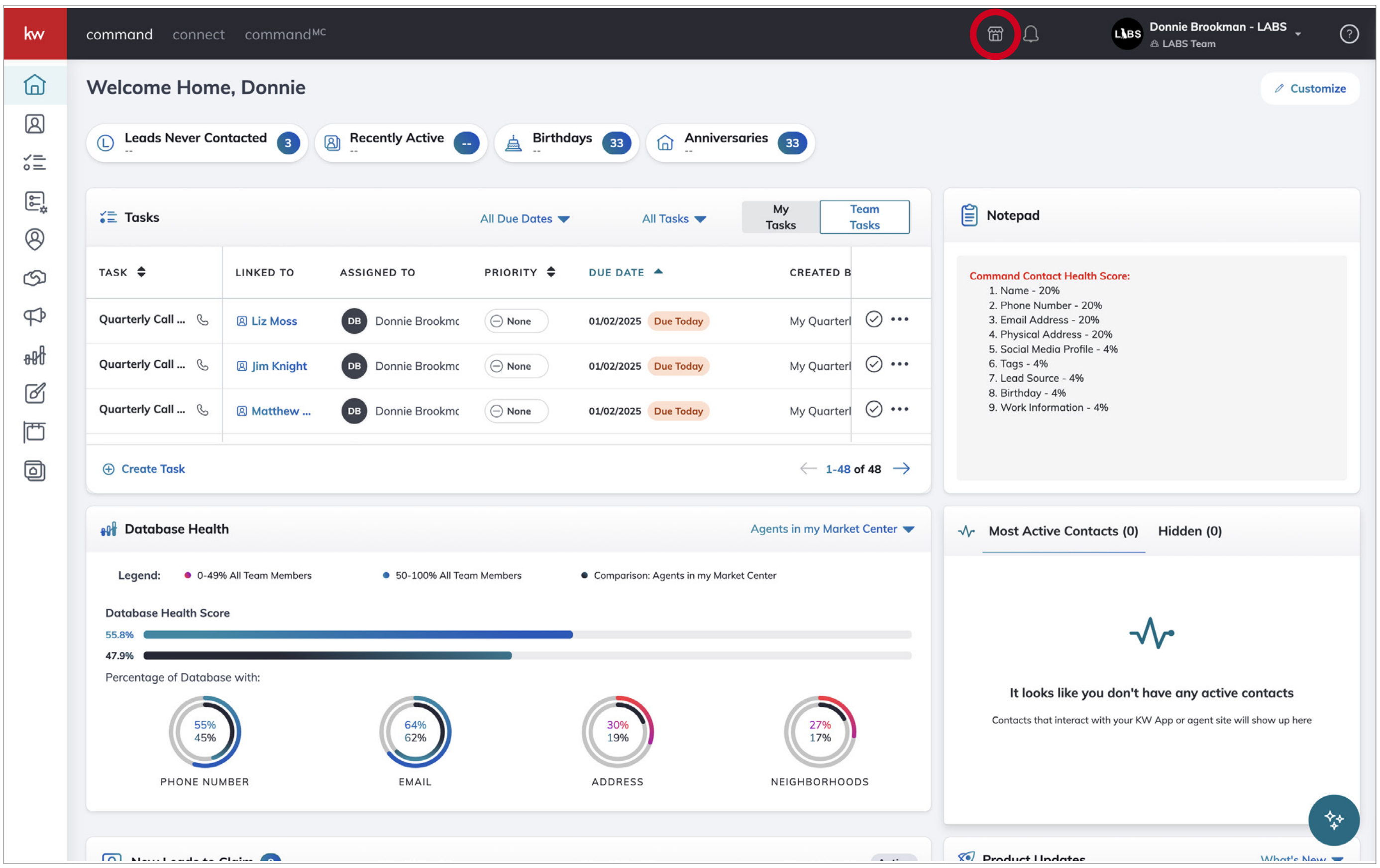

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#E5 GRANT PERMISSIONS ACROSS TEAMS

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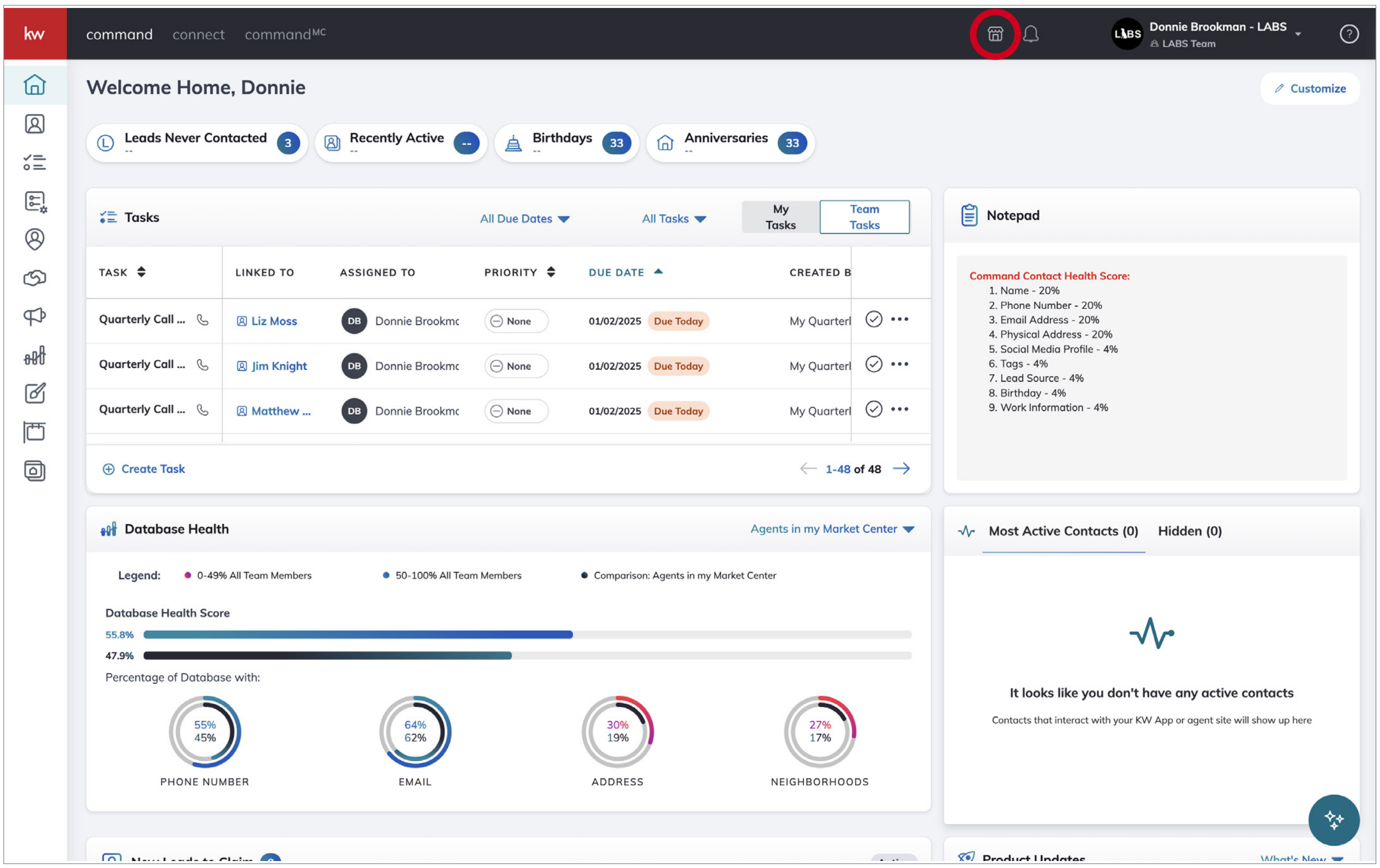

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#E6 TEAM MARKETING TEMPLATES

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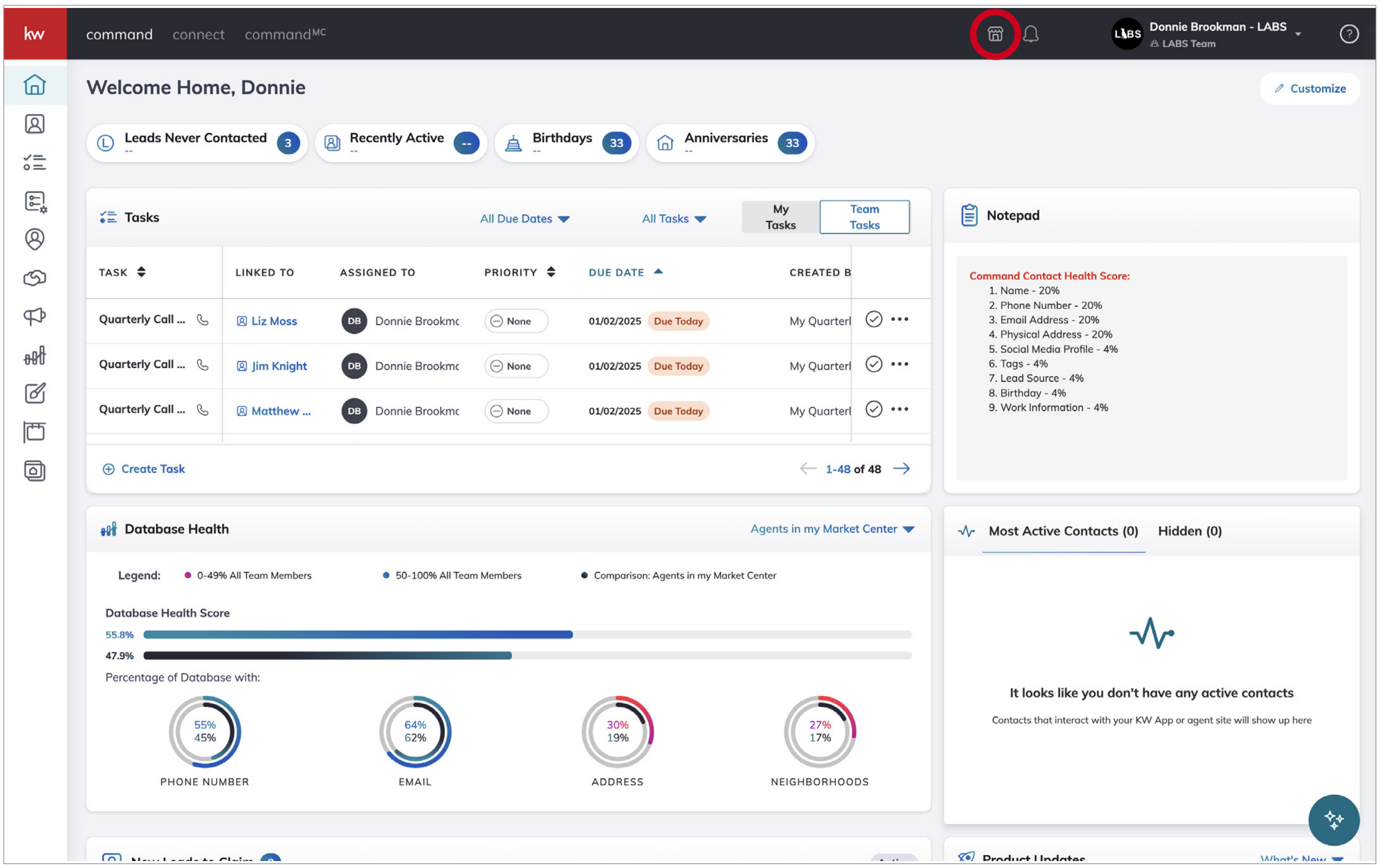

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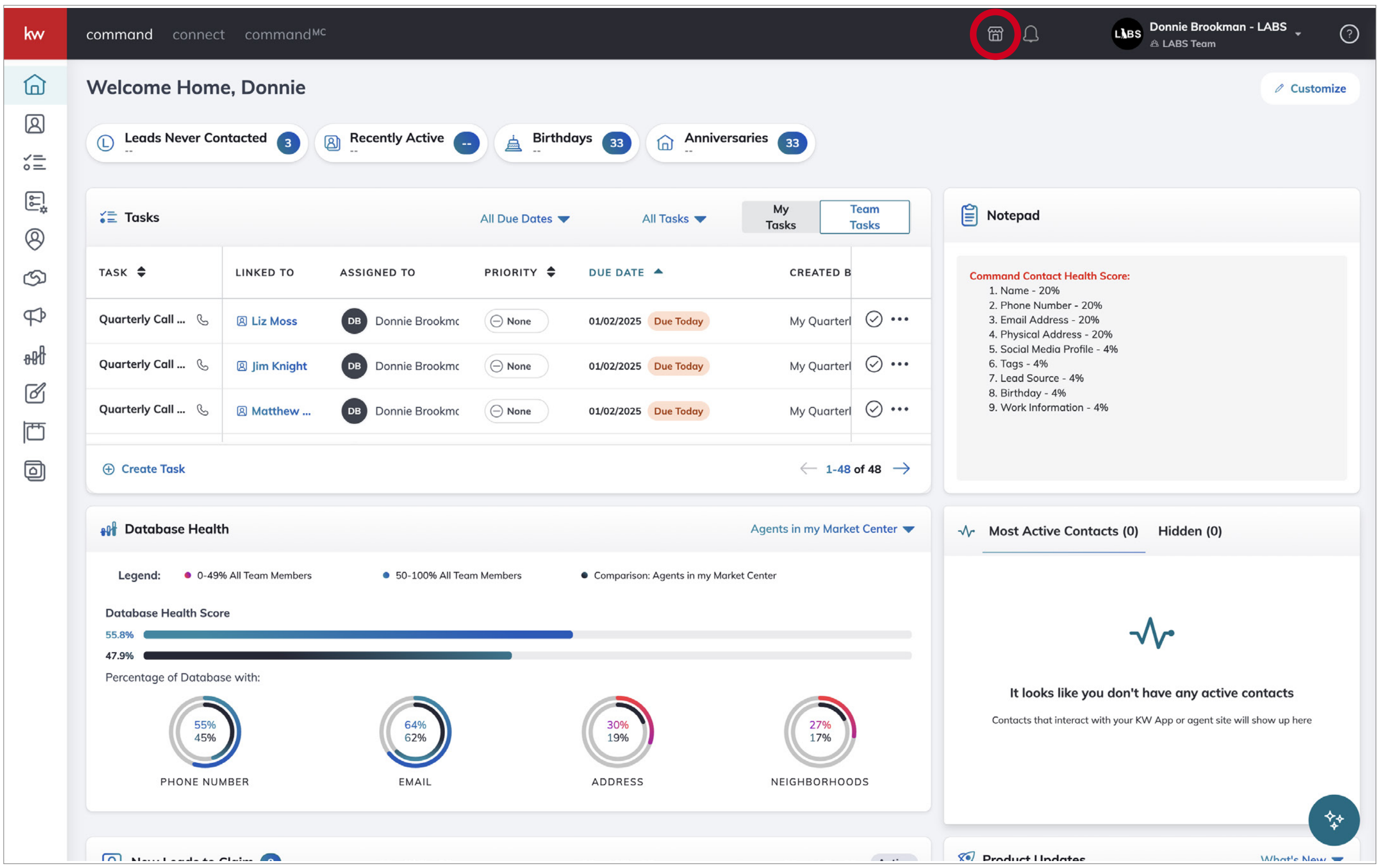

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