

Quick Start Playbook

In this playbook, we use green, yellow, and red circles to notate how actions take place within the system. This helps you understand each step in the process.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

AUTOMATION ●

When you see the green circle in a playbook, that means the step has automation in it. If the dot is on the left, a recruit enters through automation. If it's on the right, they exit through automation. Green means the system is going to work and taking action for you!

OUTSIDE ACTION ●

When you see the yellow circle in a playbook step, that means an external party takes action. This could be an agent submitting a possible recruit through the platform, or the recruit taking an action such as submitting information or booking an appointment. Yellow on the left means entering through action, while on the right means exiting.

LEADER ACTION ●

When you see the red circle in a playbook step, that means the assigned leader within the system takes action. This could be moving the recruit to another step, taking attendance after an appointment, or taking some other action. The great news is that the system does the VAST majority of tasks, allowing you to buy your time back and scale more effectively.

LEFT VS RIGHT ●●

Each stage will display two colors to the right of the stage name. The LEFT color is the most likely way a recruit ENTERS the stage while the RIGHT color is the most likely way for a recruit to EXIT the stage.

Not In School Pipeline Playbook



This breaks down the stages located in the **Not-In-School (NS)** pipeline to help you understand the lead flow at each step.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

AGENT REFERRAL ●●

The Agent Referral stage captures recruits referred by agents or leaders through the form on the /agent-referrals page. It sends a notification to the appropriate leader but doesn't trigger automation. Recruits leave this stage manually or automatically if they register for an Info Session. **IMPORTANT:** The system will automatically DND (opt-out) the recruit's phone number so they will receive no SMS messages from the system unless you opt them in.

NOT IN SCHOOL (NS) NURTURE ●●

The Not In School (Nurture) stage is for recruits interested in real estate but not yet enrolled in school. They enter this stage by selecting "Looking for Real Estate School" on the Join KW Form, triggering a six-month email campaign to keep them engaged. Recruits leave the stage either by registering for an Info Session or through manual follow-up after the campaign ends.

REGISTERED FOR INFO SESSION ●●

The Registered for Info Session stage tracks recruits who sign up for an Info Session via the integrated calendar. Once registered, they receive automated confirmation and reminders, while leaders must manually record attendance after the session. Recruits leave this stage by attending, canceling, or no-showing, which moves them to the appropriate next stage in the pipeline.

ATTENDED INFO SESSION ●●

This is a holding stage for recruits who have been marked as showed for an Info Session during the attendance process. If the recruit is ready for the next step (e.g. Enroll in KWPREP), the leader must manually move them after attendance. When in this stage, a recruit receives automated messages and the assigned user is prompted to place a few calls to the recruit over a span of 60 days to nurture them toward enrolling in school.

NO SHOW / CANCELLED INFO SESSION ●●

This stage identifies recruits who either canceled their Info Session registration or were marked as a no-show by the leader when taking attendance within the system after a scheduled Info Session. You do not have to manually move a recruit into this stage; they automatically move here based on the action taken in the first sentence. While in this stage, a recruit receives automated messages encouraging them to book a future Info Session.

1:1 APPOINTMENT SET ●●

This is a holding stage that identifies recruits who have scheduled a 1:1 appointment on the Not In School Calendar. They are automatically moved here when they register, and they are reminded about the upcoming registration at strategic points before it takes place through automated texts and emails. If the appointment is set by the User while speaking with the recruit, they'll want to use the NS Calendar to book the recruit. This calendar can be found at `{{yourdomain.com}}/nsc` where `{{yourdomain.com}}` is your recruiting website URL. By entering the recruit's information into the calendar on this page, it syncs the appointment to both of your calendars, moves the recruit into this stage automatically, and ensures they receive the email and text reminders. The goal of the appointment is to get the recruit to commit to signing up for school, verify that they've signed up for school, or receive their commitment to take advantage of the KSCORE opportunity if your Market Center offers it.

Not In School Pipeline Playbook



This breaks down the stages located in the **Not-In-School (NS)** pipeline to help you understand the lead flow at each step.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

1:1 APPOINTMENT HELD ●●

This is a holding stage a recruit enters after showing up for a 1:1 appointment and being marked showed during the attendance action. Once here, the assigned User is prompted to move the recruit to the appropriate next step. This could be transferring them to the In School pipeline, moving them to KWPrep or Kaplan pipeline for KSCORE, or transitioning them to Long Term Nurture if they are not yet ready to commit.

1:1 APPOINTMENT NO SHOWED/CANCELLED ●●

This is a holding stage to identify recruits who either canceled or no-showed a 1:1 appointment. Similar to other No Showed/Cancelled stages, they are moved here automatically when they cancel, or when the User assigned to them marks them as a No Show during the attendance process. The recruit then receives prompts to re-book their appointment.

NS EXIT PIPELINE ●●

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the NS Pipeline. Make sure to use the Exit Pipeline process to make sure a recruit doesn't end up in the NS Pipeline Holding Stage. The most likely places for the recruit to go include:

1. KWPrep Pipeline: Recruit hopes to land a KSCORE Scholarship and MC follows KSCORE Best Practices.
2. Kaplan Pipeline: Market Center offers Kaplan but not KWPrep, eschewing KSCORE Best Practices.
3. In School Pipeline: Recruit has enrolled in a third party school on their own.
4. Discontinue Process: Recruit has decided that a career in real estate is not for them.

HOLDING STAGE ●●

A Holding Stage exists at the end of each pipeline. If a recruit ends up here, it's typically due to an error when moving the recruit between pipelines. When this happens, an internal notification will be sent to the assigned user with details pertaining to the why the recruit landed here, along with pertinent information pertaining to the recruit, where they were coming from, and where they were headed.