

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.

In School Pipeline Playbook



This breaks down the stages located in the **In-School (IS)** 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 located 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.

IN SCHOOL (IS) NURTURE ●●

The In School (Nurture) stage keeps recruits who are currently enrolled in real estate school engaged with Keller Williams while they complete their education. Upon entering this stage, they're added to a six-month nurture campaign featuring 29 value-based emails and 4 engagement texts designed to maintain connection and encourage booking an appointment once ready. Leaders don't take direct action during this stage other than ensuring their In School calendar remains available for scheduling. When a recruit books an appointment, they automatically move to the 1:1 Appointment Set stage.

APPOINTMENT CALL SET ●●

The 1:1 Appointment Set stage manages recruits who have scheduled a Career Consultation through the In School calendar, ensuring smooth communication and leader accountability. Once a recruit books, they're removed from the nurture campaign and automatically receive confirmation details and reminder messages leading up to their appointment. Leaders are responsible for completing the attendance action within 48 hours, with automated reminders sent until it's done. Based on attendance, recruits automatically move to either the In School (Taking Classes) or 1:1 Appointment (Canceled/No Showed) stage.

IN SCHOOL (TAKING CLASSES) ●●

The In School (Taking Classes) stage manages recruits who have attended their 1:1 appointment and are actively enrolled in real estate school. Leaders activate a six-month drip of 19 emails, 7 texts, and 6 leader check-ins by setting the "Activate In School Drip" field to Yes, and can optionally track a signed commitment letter if required. Before completing the attendance action, leaders also set the Exam Date Check-In Cadence to define follow-up frequency for the next stage. This stage blends automation with leader accountability to keep recruits supported and progressing until they complete classes, at which point they move to the In School (Awaiting Exam Date) stage.

NO SHOW / CANCELLED APPOINTMENT ●●

The 1:1 Appointment (Canceled/No Showed) stage re-engages recruits who canceled or missed their Career Consultation. Upon entering this stage, recruits automatically receive an email and text with a link to re-register for a new appointment. If they don't act, leaders receive bi-weekly reminders to personally follow up and encourage rebooking. Recruits who re-register move back to the 1:1 Appointment Set stage, while those inactive for 90 days are moved to the Holding stage.

IN SCHOOL (AWAITING EXAM DATE) ●●

The In School (Awaiting Exam Date) stage tracks recruits who have finished their classes but haven't yet scheduled their licensing exam. Leaders maintain consistent follow-up through an adjustable check-in cadence (weekly, bi-weekly, or monthly) to encourage timely exam registration. Once the recruit provides an exam date, the leader records it in the recruit card and moves them to the Exam Scheduled stage. This stage creates a clear, organized system for leader accountability and ensures recruits stay motivated and on track as they transition from education to licensing.

In School Pipeline Playbook



This breaks down the stages located in the **In-School (IS)** pipeline to help you understand the lead flow at each step.

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

EXAM SCHEDULED (36 HOUR NOTICE) ●●

The Exam Scheduled stage supports recruits who have set their licensing exam date, giving leaders a structured opportunity to engage before the exam. Leaders receive a prompt 36 hours prior to the scheduled date to reach out, offer encouragement, and ensure the recruit is prepared. On the exam date, recruits automatically move to the Exam Taken stage. This stage provides a focused touchpoint at a critical milestone, reinforcing leader support and maintaining the Keller Williams connection.

EXAM TAKEN (3-DAY FOLLOW UP) ●●

The Exam Taken stage supports recruits who have set their licensing exam date, giving leaders a structured opportunity to engage before the exam. Leaders receive a prompt 36 hours prior to the scheduled date to reach out, offer encouragement, and ensure the recruit is prepared. On the exam date, recruits automatically move to the Exam Taken stage. This stage provides a focused touchpoint at a critical milestone, reinforcing leader support and maintaining the Keller Williams connection.

EXAM FAILED ●●

The Exam Failed stage supports recruits who did not pass their licensing exam by providing structured follow-up, resources, and guidance for a retake. Leaders receive bi-weekly reminders to connect with the recruit, offer exam prep support, and encourage scheduling a new exam. Once a new exam date is set, the recruit is moved back to the Exam Scheduled stage, or exited from the pipeline if they are no longer continuing.

EXAM PASSED ●●

The Exam Passed (Schedule Career Strategy) stage supports recruits who have passed their licensing exam and are ready to schedule a Career Strategy session. Leaders receive automated reminders every 48 hours to connect and schedule the session, either through the recruit card's Offer Career Strategy Session option or manually. Once the session is scheduled, recruits move to the Scheduled Career Strategy stage.

SCHEDULED CAREER STRATEGY ●●

The Scheduled Career Strategy stage manages recruits who have booked their Career Strategy session. Leaders receive weekly reminders to follow up and complete attendance actions. Recruits who attend the session are automatically moved to Career Strategy Held, while no-shows are returned to the Exam Passed stage for rescheduling. This stage combines automation with leader accountability to ensure sessions are completed and recruits remain engaged in the pipeline.

CAREER STRATEGY HELD ●●

The Career Strategy Held stage supports recruits after they've completed their Career Strategy session, providing structured follow-up and leader accountability. Leaders receive repeating reminders every 3 days to connect with the recruit, review session outcomes, and guide them toward the next steps in joining Keller Williams. Once the recruit's decisions are determined, the leader manually moves them to the appropriate next stage. This stage ensures consistent engagement and personalized guidance as recruits transition from strategy to action.

EXIT PIPELINE ●●

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

- Onboarding: Recruit is committed to joining KW.
- Long Term Nurture: Recruit is not joining KW, but you wish to keep in touch and check in with them.
- 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.