

# 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.

# KWPREP Pipeline Playbook



This breaks down the stages located in the **KWPREP** pipeline to help you understand the lead flow at each step.

● **AUTOMATION**   ● **OUTSIDE ACTION**   ● **LEADER ACTION**

## REGISTER FOR KWPREP ●●

This stage is the most likely landing place when a recruit enters the KWPrep Pipeline, unless the User moving them into the KWPrep Pipeline instead puts them into the Holding Stage. This stage is used to trigger the KSCORE Admin to enter a recruit into the KWPrep platform, and it reassigns the user to the KSCORE Admin in the process. Once the KSCORE Admin completes the step of entering the recruit into the KWPrep platform, they will manually move the recruit to the next stage by completing to Move to Stage steps within the Opportunity Card.

## ENROLLED IN KWPREP ●●

This stage acts as a holding stage for recruits who have been enrolled in KWPrep. It triggers a 90-day follow-up campaign depending on whether a Market Center is offering a path to Kaplan. Once the recruit enters this stage, they are reassigned to the User who owns the KSCORE Liaison role. If the Market Center is offering Kaplan, the campaign pushes the recruit to watch modules 1 and 2 of KWPrep and then complete the blueprint. If not, the campaign highlights the different modules of KWPrep, with calls to action to schedule a call to discuss next steps. The recruit will leave the stage if they complete the KWPrep Blueprint form (if KSCORE is offered), if they schedule a career consultation appointment (if KSCORE isn't offered), or if they are in this stage for 90 days without taking action after which they are moved to the Holding Stage.

## STUDENT COMPLETES BLUEPRINT ●●

After a recruit completes the blueprint form, they are automatically moved to this stage to notify the KSCORE Liaison that their blueprint has been completed. The Liaison receives an email with the recruit's blueprint responses. A recruit leaves this stage when the Liaison reviews the blueprint and moves the recruit to the next stage to schedule a call.

## SCHEDULE BLUEPRINT APPT. ●●

A recruit is moved here to trigger notifications that prompt them to schedule a blueprint review on the KWPrep Calendar with the KSCORE Liaison. A recruit leaves this stage when they schedule a blueprint review using the calendar links contained within the emails and texts.

## 1:1 APPT SET ●●

This is a holding stage that shows recruits who have scheduled a call on the 1:1 KWPrep calendar. They are moved here automatically when they book a Blueprint Review. Once the review takes place, the KSCORE Liaison will take attendance, marking that the recruit either Showed or No-Showed. The act of taking attendance automatically moves the recruit to the next appropriate stage based on whether or not they attended.

## 1:1 APPT HELD ●●

This stage acts as a holding stage for recruits the leader successfully held a 1:1 appointment with, and the recruit is automatically moved here if they are marked as Showed during the attendance taking process. While in this stage, the leader is regularly prompted to move the recruit to the next logical step.

## EXIT PIPELINE ●●●

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

- Kaplan: Recruit is moving forward with KSCORE.
- In School: Recruit is not entering KSCORE but signed up for a third party school.
- Discontinue Process: Recruit has decided that a career in real estate is not for them.

## 1:1 APPT CANCELLED / NO SHOW ●●

This stage exists to track recruits who have canceled or no-showed their 1:1 KWPrep appointment and to initiate follow-up efforts to reschedule so the recruit doesn't fall off the KSCORE Liaison's plate. While here, the recruit receives automated email and text messages encouraging them to reschedule. The Liaison is also prompted to strategically call the recruit. The recruit leaves this stage when:

1. They reschedule their KWPrep appointment, in which they are moved back to the 1:1 Appt Set stage.
2. They expire the 90-day window in which they are in this stage, after which they are moved to the Holding Stage.

## HOLDING STAGE ●●

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.