Market Center Sites 3.0

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.

Kaplan Pipeline Playbook

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

🟢 **AUTOMATION**　　🟡 **OUTSIDE ACTION**　　🔴 **LEADER ACTION**

WAITING TO SIGN UP FOR KAPLAN 🟢🔴

This stage ensures that recruits entering the Kaplan pipeline are properly assigned to the KSCORE Admin leader and ready for enrollment, with system checks in place to verify critical information before progression. It combines automated checks and leader accountability, ensuring recruits are fully prepared for Kaplan enrollment while preventing incomplete data from stalling the process.

ADDED TO KAPLAN 🟢🔴

This stage confirms that recruits have been added to Kaplan by the KSCORE Admin and initiates communication to the recruit regarding their Kaplan Scholarship, while providing leader accountability to monitor enrollment completion. The KSCORE Admin and/or KSCORE Liaison no longer need to send the recruit information on how to sign up for Kaplan, redeem their KSCORE Scholarship Code, and get started with the licensing process — it's all automated. Instead, the KSCORE Admin should monitor registration daily to ensure timely enrollment and maintain pipeline momentum. This stage balances automated recruit communication with leader accountability, ensuring all recruits are properly registered in Kaplan while enabling proactive support from the KSCORE Liaison if issues arise.

ENROLLED IN KAPLAN 🔴🟡

This stage supports recruits who have completed Kaplan enrollment and are actively taking classes. It combines decision tree automation and leader engagement to monitor progress, encourage completion, and manage Kaplan extensions when necessary. Once the KSCORE Admin confirms the recruit has registered for Kaplan, they manually move the recruit to this stage, which reassigns the recruit to the KSCORE Liaison. The decision tree relates to new enrollees vs. re-enrollees (extension purchasers). Leaders should maintain regular check-ins, ensure extension fields are updated as needed, and monitor recruit progress to prevent expiration without engagement. You can set a cadence of weekly, bi-weekly, or monthly in the Opportunity Card for this follow up. The recruit will remain in this stage for six months, based on when they enter it, after which they will automatically move to course expired. While in this stage, the recruit receives automated email and text-based drips encouraging them along the path to complete their Kaplan course. If the recruit completes their Kaplan courses and moves forward with licensing, the KSCORE Liaison can move them to the appropriate testing stage in the In School Pipeline through the Exit Pipeline process.

KAPLAN EXPIRED 🟢🔴

This stage identifies recruits who have not completed their Kaplan courses within their allotted time, signaling the need for leader follow-up to determine next steps—such as purchasing an extension or restarting the Kaplan process. Recruits enter automatically when the allotted time expires, and the leader is prompted twice over 30 days to connect with the recruit and determine next steps before the recruit is dropped from the pipeline. If they start Kaplan over or purchase an extension, the leader will make the appropriate updates to the Purchased Kaplan Extension field in the Opportunity Card, and move them back to Enrolled in Kaplan (Taking Courses).

EXIT PIPELINE 🔴🟢

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the Kaplan 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 is the In School pipeline once the recruit has completed school and is ready to take the Licensing Exam.

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.