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.

Onboarding Pipeline Playbook

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

● AUTOMATION ● OUTSIDE ACTION ● LEADER ACTION

SCHEDULE ONBOARDING ● ●

The Onboarding Scheduled stage connects new recruits with the appropriate Onboarding Specialist and ensures their onboarding session is set up promptly. When a recruit enters this stage, the Onboarding Specialist is assigned as the leader and receives daily reminders to record in the Opportunity Card whether the recruit will onboard via a personal (1:1) or group (1-to-many) meeting. Once the session type is selected, the Onboarding Specialist will manually move the recruit to the Onboarding Offered stage.

ONBOARDING OFFERED ● ●

The Onboarding Offered stage ensures new recruits are matched with the correct onboarding session type and sets the stage for their smooth transition into Keller Williams. The recruit will begin receiving automated communication (email and text) to schedule their onboarding meeting, while the Onboarding Specialist is reminded every 48 hours to follow up with the recruit if they have not yet scheduled. Once the recruit schedules their onboarding, they automatically advance to the next stage.

ONBOARDING SCHEDULED ● ●

The Onboarding Scheduled stage tracks new recruits who have scheduled their onboarding session via the applicable onboarding calendar. The recruit will receive meeting details via email and receive reminders until the meeting takes place. After the meeting, the Onboarding Specialist will take attendance to automatically move the recruit to the next most appropriate stage. If the recruit doesn't show up or cancels, they move back to the prior stage for rescheduling; if they attend the session, the recruit moves to the Joined KW stage.

JOINED KW ● ●

The Joined KW stage marks the moment when the recruit officially becomes part of Keller Williams. At this point, the recruit has completed onboarding, their documentation is finalized, and they are fully integrated into the team. The leader shifts focus to ongoing momentum, supports their transition into active production, and coordinates any next-step training or system access. This stage is the ultimate achievement for your team, and will be noted in the Reporting Dashboard. Time to celebrate!

EXIT PIPELINE ● ●

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the Onboarding 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 place for the recruit to go from this pipeline is the Long Term Nurture for Licensed Agents. Make sure to set the Auto-Expire and Cadence timeframes if moving a recruit to LTN.

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.