

# 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.

# How to Move Recruits

Aside from automatic movement between stages, moving recruits takes place in three ways: 1) taking attendance, 2) approval check process, or 3) exit pipeline process.

### **TAKING ATTENDANCE**

Attendance must be taken after each appointment regardless of whether it's a 1:1 or a group session. Below are the steps to take attendance:

1. When logged into the platform, select Calendars from the left vertical navigation.
2. Select "Appointment List View" along the top horizontal navigation.
3. Use the Advanced Filters menu to locate the appointment, contact, or date of appointment. (You can also create and save Smart Lists for easy access of specific calendars).
4. Toggle the Status of a "Confirmed" appointment and select Showed or No-Showed

### **MOVING BETWEEN STAGES**

You may be required to move recruits between stages from time to time. To do this, follow the steps below:

1. Locate and open the Opportunity Card within the pipeline by clicking the card anywhere EXCEPT the recruit's name.
2. In the Card's left vertical navigation, select the current pipeline.
3. Toggle the Approval Check field to "Yes" and the Move To field to the stage you wish to move the recruit to.
4. Click the blue Update button in the lower left corner then close the opportunity card.
5. Manually drag and drop the Opportunity Card in the new stage.

### **MOVING BETWEEN PIPELINES**

You may be required to move recruits between pipelines from time to time. To do this, follow the steps below:

1. Locate and open the Opportunity Card within the pipeline by clicking the card anywhere EXCEPT the recruit's name.
2. In the Card's left vertical navigation, select the Exit Pipeline/Long Term Nurture.
3. Toggle the Approval Check field to "Yes" and the Exit To field to the pipeline you wish to move the recruit to.
4. Toggle the Send to Holding Stage field to "Yes" only if you wish to move the recruit to that stage and dictate where they'll go next within that pipeline
5. If you are moving the recruit to the Long Term Nurture pipeline, set your Follow Up Cadence (how frequently you'll be prompted to check in with the recruit) and your Auto Expire (how long you'll follow up with them).
6. Click the blue Update button in the lower left corner then close the opportunity card.
7. Manually drag and drop the Opportunity Card in the new 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.

# 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.

# 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.

# 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.

# Long Term Nurture Playbook



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

● AUTOMATION   ● OUTSIDE ACTION   ● LEADER ACTION

## **NOT IN SCHOOL (NS), IN SCHOOL (IS), LICENSED AGENT (EX)**   ● ●

These three stages provide a centralized system for long-term follow-up with recruits, allowing leaders to maintain engagement based on recruit type while tracking progress with automated cadence reminders and auto-expire settings. While in this stage, recruits are added to a follow-up cadence based on the setting in their recruit card (Weekly, Bi-Weekly, Monthly, or Quarterly), and it lasts according to the Auto-Expire setting within the recruit card (3, 6, or 12 months). The leader will receive reminders according to the assigned cadence to maintain follow-up. Once Auto-Expire reaches 30 days, the Opportunity is moved to the Expired Nurture stage and the assigned leader is prompted to determine next steps.

## **EXPIRED NURTURE (LAST 30 DAYS)**   ● ●

This stage serves as a final 30-day window for long-term nurture recruits who have reached the end of their Auto-Expire period, giving leaders the opportunity to take action before the recruit is automatically dropped from the pipeline. At this stage, the leader should review the Cadence and Auto-Expire values, adjust them if necessary, and move them back to the appropriate NS, IS, or EX stage if they wish to continue outreach. Otherwise, the recruit is automatically dropped from the pipeline and no further communication will take place.

## **EXIT PIPELINE**   ● ●

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the Long Term Nurture Pipeline. Make sure to use the Exit Pipeline process to make sure a recruit doesn't end up in the Holding Stage. Use this process to move a recruit from the LTN pipeline to the related applicable pipeline.

## **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.

# 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.

# R1/R2 Experienced Agent Playbook



This breaks down the stages located in the **R1/R2 Licensed Agent (EX)** pipeline to help you understand the lead flow at each step.

● AUTOMATION   ● OUTSIDE ACTION   ● LEADER ACTION

## RECRUIT LEADS ●●

The Recruiting Leads (Pre-Appointment) stage alerts the leader that they have a licensed agent recruit and encourages them to reach out, introduce yourself, begin building rapport, and book an appointment with them. Once the leader has booked the appointment, the leader will log the date they booked the appointment on (not the date it is for) and any notes using the emailed link to the next stage. The recruit can also book themselves onto the Licensed Agent Calendar, which will move them forward in the pipeline.

## APPOINTMENT SCHEDULED ●●

The Appointment Scheduled stage is used when a recruit has booked an appointment on the Licensed Agent Calendar or when the leader completes the prompt in the email notifying the system that an appointment has been scheduled. The recruit will receive reminders of the appointment when available and the leader is prompted to follow up with the recruit to ensure attendance. A recurring email will be sent to the leader asking whether or not the appointment took place, and what the result of the appointment was (the recruit showed, the recruit cancelled/no-showed). Based on the response from the leader, the system will move the recruit back to Recruit Leads (if they did not attend) or forward to Nurture Lead (if they did).

## NURTURE LEAD ●●

The Nurture Lead stage prompts the leader to continually check in with the recruit after their 1:1 appointment based on the cadence set in the recruit's card (7, 14, or 30 days). This will continue until the leader updates the recruit's status in the Opportunity Card changing the check-in cadence, or moves them to the next most appropriate pipeline (typically Long Term Nurture or Onboarding) via the Exit Pipeline process.

## EXIT PIPELINE ●●

This is a holding stage that a recruit enters briefly when moving between pipelines but starting in the R1/R2 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:

- Long Term Nurture: Recruit isn't ready to change brokerages or chooses a different brokerage, and you want to keep in touch.
- Onboarding: Recruit has decided to join your Market Center. You're a rockstar!

## 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.