

PASSPORT TO SUCCESS

Guide to Getting Started

A list of activities to help you
build a successful real
estate business



Keller Williams Exclusive Properties
2655 First Street #150, Simi Valley, CA 93065
805.777.7117
DRE#: 01516415

Important Info

- | | |
|------------------------------------|-------------------------------|
| 1. Phone Number | 805.777.7117 |
| 2. Fax Number | 805.583.7655 |
| 3. KW International Website | www.kw.com |
| 4. KW Exclusive Properties Website | www.KWExclusiveProperties.com |
| 5. KW Agent Resources Website | Agent.KWSimi.com |

KW Exclusive Properties Market Center ID #: 563
Office Tax ID Number: 20-2505507
Office Broker ID: 01516415

Office Hours

Mon-Fri: 8:30am-5:30pm

Saturday - Sunday: Closed

You can access the office after hours with the door code.
(Sent to you via email upon joining)

Building Hours

Mon-Fri: 8:00am-5:30pm

Saturday: 10:00am-4:00pm

Sunday: Closed

You can access the building after hours with the door code.

Username / Password

myKW.kw.com : _____

Copier Code: _____

MLS ID Number/Login: _____

NRDS Number (CAR/NAR): _____

ZipForms: _____

SUPRA Number: _____

Robert Harris

Operating Principal & Broker

Legal Questions,
DRE Issues

Caryn Saul

Team Leader

Recruiting Agents Real Estate School,
Agent Support, Career Night,
Commission Adjustments,
Coaching Programs,
Building Teams

Mark Del Santo

Productivity Coach Mentor

Mentor Program,
Coaching Program, Goal Setting &
Tracking, Business Planning, Contract
Issues & Negotiations

Cynthia Livesay

Compliance Manager

C.A.R. Forms, Legal Questions, Realtor
Code of Ethics, Procuring Cause &
Commission, Conflict
Resolution & Disputes, Risk Management

Kate Boyte Moya

Market Center Administrator

Commission Checks & Reports, Agent
Billing & Accounts Payable, Board
Membership Applications,
Commissions/CDA/Opportunities, Office
Space Availability, Office Keys

Emily Senter

Market Center Coordinator

Phone Roster Changes, Business
Cards/Yard Signs/Name Tags, Mail & Fax
Pickup, Training Calendar, Scheduling
Conference Rooms, Office/
Printer Codes

Cameron Knudsen

Tech Coordinator

KW Technology Training &
Questions, New Agent Transition Support,
Market Center Office Equipment, and
Print Drivers for Copiers, Email
Address Book for Scanning

Janice Del Santo

Compliance Review

Contract & Command Transaction File
Review

Our Mission, Vision, Value, Belief System & Perspective

MISSION

To build **CAREERS** worth having,
BUSINESSES worth owning,
LIVES worth living,
EXPERIENCES worth giving, and
LEGACIES worth leaving.

VISION

To be the real estate
COMPANY OF CHOICE
for agents and their customers

VALUES

GOD.
FAMILY.
then **BUSINESS.**

OUR PERSPECTIVE

A TECHNOLOGY COMPANY
THAT PROVIDES THE REAL ESTATE
PLATFORM THAT OUR AGENTS
BUYERS AND SELLERS PREFER.

At Keller Williams Realty, we proudly and fondly refer to our beliefs as **WI4C2TES**. This is how we grow our relationship among ourselves.

OUR BELIEF SYSTEM

WI4C2TES

WIN-WIN or no deal
INTEGRITY do the right thing
CUSTOMERS always come first
COMMITMENT in all things
COMMUNICATION seek first to understand
CREATIVITY ideas before results
TEAMWORK together everyone achieves more
TRUST starts with honesty
EQUITY opportunities for all
SUCCESS results through people

4-1-1

The 4-1-1 is a productivity tool that drives your goal setting from the desired end results to the present. 4-1-1 stands for four weeks, one month, and one year; but you must first set the yearly goals and then detail monthly and weekly goals. It is not a to-do list; it's a have-to-do list.

1-3-5

1-3-5 is a goal tracker: Choose 1 goal, you brainstorm 3 priorities to achieve your 1 goal. Next, build 5 strategies to implement your 3 priorities. If your strategy is to acquire more listings, a strategy could be cold calling leads, contacting FSBOs, or door knocking. Define which actions are needed to carry out the strategy. Use your strategy as a guiding principle to bring your goal closer

G – Commit to accomplishing one big goal.

P – Identify three priorities that will help you to achieve your one big thing.

S – Determine five strategies that will help you to accomplish your three priorities.

ALC

Associate Leadership Council. A group of individuals drawn from the Top 20% of Market Center producers.

Allied Resources

People in a position to help each other reach their goals. These are individuals you have met that you expect either to do business with or to receive leads from every year.

Big Rocks

If you are given a glass, different materials, large rocks, small rocks, pebbles, sand, water; fit into the glass in different ways. By putting water first, then sand, then pebbles, then small rocks, then big rocks, you would fit less material. But if you put the big rocks in first, etc., you can fit more materials into your glass.

MREA (aka The RED Book, aka The Bible)

Essential economic budgetary, organizational, and lead generation models that are foundations of any high-achiever's business Book "The Millionaire Real Estate Agent" By Gary Keller with Dave Jenkins and Jay Papasan.

The One Thing

What is the one thing you can do this week such that by doing it everything else would be easier or unnecessary? Sometimes it's the only thing you do. But it's always the ONE Thing that delivers extraordinary results. Book: "The One Thing": By Gary Keller with Jay Papasan

Associate

An agent who joins Keller Williams is referred to as an associate because they are treated like a stakeholder in an interdependent business model

Capper

An individual who produces sufficient GCI and contributes enough Company Dollar to the Market Center to satisfy his/her annual commission Cap requirement. After capping, the individual keeps all commission income.

Company Dollar

The money the Market Center keeps after all the agents are paid their commissions. The Market Center uses these funds to pay bills and to make a profit.

Fill The Bucket

During team meetings, you might recognize an individual who has helped you by going above and beyond their job description— you might “fill their bucket.”

Market Center

Keller Williams Realty believes that success in real estate occurs out in the marketplace, not in an office. It is the Keller Williams philosophy that everything we do, even down to the name we give our sales offices, should reflect our philosophy. Hence, Keller Williams has “Market Centers” ... not offices.

GCI

Gross Commission Income. The total amount of commission dollars the Market Center receives from a transaction.

Profit Share

Amount of Market Center profit that is sent to KWRI for distribution to the appropriate Associate in the Profit Share Tree.

Growth Share

Residual income paid to Keller Williams associates who help grow the company outside the United States and Canada.

The Model

The process set forth by Keller Williams Realty International that describes the guidelines to be followed for the successful launch and profitable operation of a Market Center.

Transmittal

The monthly process through which the Market Center closes their books and sends their information to KWRI. Transmittals are due by the 3rd business day of the following month. Market Centers transmitting late are assessed a late transmittal fee of \$100 per day. This late charge is never waived. Successful transmittal is a critical task for the Market Center leadership team.

KPA

The Keller Personality Assessment (KPA) is a comprehensive personality tool that brings a complete understanding on an individual - encompassing not only how a person behaves but how they THINK.

KW Connect

KW Connect is an internet based training resource center provided by Keller Williams University. KW Connect brings world class trainers right to your computer...any time YOU want! KW Connect can help every agent in their business.

To Access KW Connect

Visit www.KWConnect.com and login with your KW username and Password

Follow us on KW Connect!

Mark - KWConnect.com/profile/89717

Cynthia - KWConnect.com/profile/27477

Cameron - KWConnect.com/profile/217920

Caryn - KWConnect.com/profile/32570

MLS Info

FlexMLS.com

Username:_____

Password:_____

CAR.org

Username:_____

Password:_____

SRAR Website

<https://www.srar.com/>

CSMAOR Website

<https://csmaor.com/>

Meet Your Leadership Team

- Team Leader (TL)
- Market Center Administrator (MCA)
- Market Center Coordinator (MCC)
- Market Center Tech Trainer (MCTT)
- Productivity Coach (PC) / Mentor

Tasks

- Keller Personality Assessment/KPA (MCA)
- Join Local Association / Board / MLS (MCA)
- Get SupraKey
- Attend KW Orientation (See Calendar)
- Order Business Cards (MCTC)
- Order Name Tag (MCTC)
- Copier/Scanner Codes (MCC)
- Set up Headshot/Photo (MCTC)
- Tech Orientation (MCTC)
- Printer Driver on Laptop (MCTC)
- Launch Website
- Download KW App
- Download Kelle App
- Draft Announcement
- KW Profile to 100% (MCTC)
- Upload Contacts into Command
- Read Company Policies/Guidelines
- Sign Mentor/PC Agreement
- Meet w/PC for KPA Analysis
- Send out "I've Joined KW" Announcement Letter
- Meet with PC to do Business Plan
- Meet with PC to set goals (1-3-5, 411)
- Daily Success Habits 10/4
- Update Social Media to Show New Career
- Update Voicemail
- Order Branded Materials

Tasks

- Draft Agent Bio
- Attend Association Orientation (@ Association)
- Attend Beginning MLS Training (@ Association)
- Begin Zipforms Training (online)
- Set Up MLS and Zipforms Profiles (AS or PC)
- Set Up Zipforms Templates (PC)

My First 30 Days (KW Classes)

Class Description

- New Agent Orientation
- KW Command
 - Set-Up
 - Contacts
 - Opportunities
 - Agent Websites
 - KW App
 - Referrals
 - SmartPlans
 - Tasks
 - Campaigns
 - Reports/Goals
 - Consumer
- Facebook and Instagram for Business
- Lending
- Escrow Basics
- Title Basics - Prelim, Farming
- ZipForms & E-Signature
- ZipForm Templates
- Home Protection Plan
- Natural Hazard Disclosure
- Open House Certification

Tasks

- Build your Affiliate Team (PC):
 - Escrow Officer
 - Title Rep
 - Home Warranty
 - Termite/Pest Inspector
 - Home Inspector
 - Natural Hazard Disclosure Rep
 - Write Thank You Notes to Mets/Follow Ups/Affiliates

- Write and Know Your Value Proposition
- Create Buyers Presentation (Designs)
- Create Listing Presentation (Designs)
- Launch SmartPlan Campaign
- Create Sample CMA - Cloud RPR
- Complete Sample RPA/RLA
- Learn Realist
- Keller Mortgage Set Up
- Complete Open House Certification Course
 - Set Up Open House Opportunities
 - Complete Circle Prospecting
 - Conduct Open House
- Set up Farm/Meet w/ Title Rep
- Create Saved Search/Farm in MLS
- Launch Farming Campaign
- Read KW Company Policies/Guidelines

Things to Master



Contacts



Tasks



SmartPlans



Referrals



Opportunities



Campaigns



Reports



Designs



Consumer

Visit:
agent.kw.com

Class Description

Date Completed

Ignite Orientation	_____
Fuel Your Career	_____
Prospecting	_____
Lead Gen is the Core of Your Business	_____
Marketing	_____
Powerful Language Gets Results	_____
Open Houses	_____
Your Database is you Business	_____
Seller Appointments	_____
Set Goals That Matter	_____
Buyer Consultations	_____
Deliver Your Value Proposition	_____
Make & Receive Offers	_____
Find & Win The Buyer	_____
Negotiate The Deal	_____
Find Seller Leads	_____
Financial Basics	_____
A Day In The Life Of An Agent	_____
Contract To Close	_____
Know Before You Close: MC Systems & Policies	_____

***Review these classes on your own and
implement them into your plan***

Ignite Can Be Found on the Agent Resources Website:

agent.KWSimi.com/ignite

RLA (Residential listing agreement) Module:

- AD-1 (Agency Disclosure / Listing Firm To Seller)
- PRBS (Possible Representation of More Than One Buyer or Seller)
- WFA (Wire Fraud Advisory)
- RLA (Residential Listing Agreement)
- SA (Seller's Advisory)
- DIA (Disclosure Information Advisory)
- KW Addendum
- SELM (Seller Instruction To Exclude From MLS)
- SPRP (Seller Purchase of Replacement Property)
- TA (Trust Advisory)
- RCSD-S (Representative Capacity Signature Disclosure for Seller Representatives)
- MT (Modification of Terms)
- COL (Cancellation of Listing)

Seller Disclosures Module:

- SBSA (Statewide Buyer & Seller Advisory)
- WCMD (Water Conserving Plumbing Fixtures Carbon Monoxide Detector Notice)
- FLD (Lead Based Paint) prior to 1978
- AVID (Agent Visual Inspection Disclosure)
- SPQ (Seller Property Questionnaire)
- TDS (Real Estate Transfer Disclosure Statement)
- ESD (Exempt Seller Disclosure Statement)
- E-pubs Forms re: lead, water conservation, earthquakes, home energy ratings, etc)
- Earthquake Report prior to 1960

RPA (Residential purchase agreement) Module:

- AD-2 (Agency Disclosure / Selling Firm To Buyer)
- PRBS (Possible Representation of More Than One Buyer or Seller)
- WFA (Wire Fraud Advisory)
- RPA (Residential Purchase Agreement)
- BIA (Buyer's Inspection Advisory)
- MCA (Market Conditions Advisory)
- BHAA (Buyer Homeowner Association Advisory)
- KW Addendum
- COP (Contingency of Purchase)
- FVAC (FHA/VA Amendatory Clause)
- RCSD-B (Representative Capacity Signature Disclosure for Buyer Representatives)
- SCO, SMCO, BCO (Counter Offers)
- SIP, TIP, RLAS (Seller/Tenant In Possession, Residential Lease After Sale)
- RR, RRRR, TOA (Request for Repairs, Seller Response & Text Overflow Addendum)
- CR (Contingency Removal)
- VP (Verification of Property Condition)

Exclusive Properties Escrow:

- ABD Affiliated Business Disclosure
- DIA Disclosure Information Advisory
- PIA Photographic Images Disclosure

Non-Performance Forms Module:

- NBP (Notice To Buyer To Perform)
- NSP (Notice To Seller To Perform)
- DCE (Demand To Close Escrow)
- CC (Cancellation of Contract)
- BDRD (Buyer Demand To Release Deposit)
- SDRD (Seller Demand To Release Deposit)
- DM (Demand for Mediation)

Lease Module:

- LL (Lease Listing Agreement)
- AD-1 (Agency Disclosure / Listing Firm to Landlord)
- BBD (Bed Bug Disclosure)
- KLA (Keysafe/Lockbox Addendum)
- FLD (Lead-Based Paint) prior to 1978
- LRM (Lease Rental Mold Ventilation Addendum)
- PET (Pet Addendum)
- PHSA (Pool, Hot Tub & Spa Addendum)
- PSD (Parking & Storage Disclosure)
- TFHD (Tenant Flood Hazard Disclosure)
- WCMD (Water Conserving Plumbing Fixtures & Carbon Monoxide Detector Notice)
- WSM (Water Submeter Addendum)
- LRA (Application to Rent/Screening Fee)
- DRA (Denial of Rental Application for Credit Reasons)
- LR (Residential Lease or Month-to-Month Rental Agreement)
- AD-2 (Agency Disclosure / Selling Firm to Tenant)
- LCA (Lease/Rental Commission Agreement)
- MIMO (Move-In, Move-Out)
- KW Lease Money Disposition Form (from Office Intranet)

Mobile Home Module:

- MHA (Manufactured Home Advisory Addendum & Release)
- MHDA (Manufactured Home Dealer Addendum)
- MHLA (Manufactured Home Listing Addendum)
- MHPA (Manufactured Home Purchase Agreement & Joint Escrow Instructions)
- MHTDS (Manufactured Home/Mobile Home Transfer Disclosure Statement)

Vacant Land Module:

- VLL (Vacant Land Listing Agreement)
- VLQ (Seller Vacant Land Questionnaire)
- VLPA (Vacant Land Purchase Agreement & Joint Escrow Instructions)
- BVLIA (Buyer's Vacant Land Additional Inspection Advisory)

Misc Module:

- AD-3 (Agency Disclosure / Selling Firm to Seller: For Dual Agency)
- AAA (Additional Agent Acknowledgement)
- ABA (Additional Broker Acknowledgement)
- ADM (Addendum)
- AEA (Amendment of Existing Agreement Terms)
- ASA (Additional Signature Addendum)
- BEO (Buyer Early Occupancy Addendum)
- BUO (Back Up Offer Addendum)
- NNR (Notice of Non-Responsibility)
- PA (Probate Advisory)
- PLA (Probate Listing Addendum)

Misc Module CONT.:

- PPA (Probate Purchase Agreement & Joint Escrow Instructions)
- PSA (Probate Signature Addendum)
- SP (Single Party Compensation Agreement)
- SUM-MO (Summary of Multiple Offers)
- SUM-RPA (Summary of RPA)
- WOO (Withdrawal of Offer)

Zip Forms Templates Modules:

- Listing Template
- Purchase Template
- Lease Template

Excel:

- Transaction Checklist