Seminars
Playbook

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Welcome To The Seminars Playbook

There are 1,440 minutes in a day. → **Every real estate agent gets the same number of minutes, it is up to you how you choose to invest those minutes.**

In a shift, conversion rates go down, which means you need to fill your lead funnel with more leads in the same amount of time spent for lead generation before. The market shifted. Seminars provide a scalable way to feed the top of your lead funnel, touch your sphere, and establish yourself as the market leader in any niche that you select.

Running seminars at a high level allows you to position yourself as the resource every seller, buyer, and investor needs and build your reputation as a knowledgeable and trusted advisor. By consistently providing high-quality content that solves the most common problems and answers the most common questions with clear concise solutions, you become the go-to agent in your market and gain a competitive advantage.

This Playbook is designed to teach you how to do just that!

Why Seminars?

Scalability

Seminars are an opportunity to capture leads at scale. For in-person seminars, you gain the opportunity to speak to a room full of potential clients and make a preliminary determination of who is able, ready, and willing to transact so that you can focus appointment time on the motivated buyers and sellers. Virtual seminars can provide even more scalability as they can offer the participant ease of participation and low commitment high information touches.

Brand Awareness

Seminars are an opportunity to create or enhance awareness of your brand. The marketing rule of seven is simple: a potential client must see your brand at least seven times before they'll be provoked to take an action. You can use each seminar to create at least seven touches:

1. Social media posts/ads before the event
2. Text message invitation
3. Email invitation
4. Phone Call invitation
5. Reminders for the seminar
6. Follow-up emails, texts, and calls
7. Seminar highlights on social media

Top of Funnel, Motivated Leads

When you have a guest in your seminar who indicates that they are eager and motivated to transact, the seminar becomes the precursor to an appointment and subsequent conversion. In this way, seminars can provide you NOW business opportunities. However, most of your audience members are going to be top of funnel leads; they may not be able, ready, or willing to transact right away. Think of these as eventual clients that build your pipeline for the future.

It is crucial for you to utilize audience participation to determine which attendees within your database call into different categories such as:

1. **Hot:** These attendees are ready, willing, and able to transact in the next 90 days. Set an appointment with them before they leave the seminar if possible or immediately after.

2. **Nurture:** These attendees want to transact 90 days to a year from now. Follow up with them about the topics from the seminar with a call twice a month and a weekly or biweekly email.

3. **Watch:** Some folks will attend your seminar out of curiosity and a year or more away from transacting. Cultivate a relationship with them via a monthly call, invitations to future seminars on related topics, and a monthly email about the market.

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Seminars

Step One

Choose Your Seminar

1. **Understand the Audience**
2. **Pick Your Seminar Topic**

Step Two

Plan Your Event

1. **Choose Event Style: Virtual or In-Person**
2. **Set the Budget**
3. **Establish Event Cadence**
4. **Develop Presentation Materials**
5. **Find a Partner**

Step Three

Invite People

1. **Set Up the Registration Form**
2. **Invite Your database**

Step Four

Promote the Event

1. **Create Marketing Materials**
2. **Market the Event**
3. **Contact Registered Guests**

Step Five

Host the Seminar

1. **8 tips for a Winning Seminar**
2. **Best Practices for Hosting In-Person**
3. **Best Practices for Hosting Virtually**

Step Six

Follow Up

1. **Follow Up with Attendees**
2. **Follow Up with No-Shows**

Step Seven

Prospect and Market Between Events

1. **Virtual Seminars**
2. **In-Person Seminars**

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Select a topic that is relevant and timely for your market, aligns with your brand, and solves a problem you hear frequently from clients and potential clients. This should be an area that allows you to demonstrate your expertise and establish yourself as a thought leader.

Remember what Gary and Jay say:

1. There are two ways to get people's attention:
    1. Tell them something that they do not know
    2. Tell them something that they already know but in an unexpected way

2. There are two ways to sell something:
    1. Solve a problem for someone
    2. Present an opportunity to someone

Understand The Audience

What type of leads are you looking for? As real estate professionals, we might start by saying, all of them! In reality, we need to consider **Shift** tactic #1: Get Real, Get Right. We cannot possibly run in every direction at the same time, instead we make choices on what to focus on and how to spend our 1,440 minutes each day.

What would be the smartest, most effective and efficient lead pool to focus on in your current market? Which group of people can you relate to and ideally want to work with? Do you want sellers, buyers, investors, first-time home buyers, retirees, military personnel, vacation buyers, divorcees, newlyweds… there is literally no end to the type of lead that you can generate.

Pick Your Seminar Topic

Below are several popular examples of Seminar topics. Choose something that matches the audience you are trying to attract.

Seminar Examples	Audience	Who Are They
First Time Home Buyer Workshop	Buyers	Renters or those living with family/friends who are new to the home buying process
Home Sellers Workshop	Sellers	Current homeowners who may desire to sell their home
Mortgage Hacks	Buyers & Sellers	Buyers and current homeowners looking for a fiduciary to help them achieve their real estate goals and pay less over the life of their loan
Investor Workshop	Investors	Current and potential real estate investors looking to grow their portfolio or improve their hold and flip strategies
Real Estate Planning	Sellers	Older adults who need to right-size and beneficiaries of older adults who have recently passed

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The right seminar format will depend on you, your audience, the budget, timeline, and the materials that you will be utilizing.

Choose Event Style: Virtual or In-Person

Deciding how you want to host your seminar is the first step to planning the event. There are advantages and considerations to any format, however you can opt for a hybrid

	Advantages	Considerations
Virtual	Low cost, quick and easy to plan: you can set up with minimal equipment and shorter lead time	Technology challenges: nuances of each platform can pose challenges and technical difficulties during delivery reduce the effectiveness of the seminar
	Broader reach & impact	Less personal connection
	Attendance is easy and offers anonymous participation for attendees	No control over the environment or distractions
	Recording can be leveraged for future event promotion in highlight clips or for training new team members	Loss of authority and prestige that standing in front of a room can bring
In-Person	More nuanced communication with postures, gestures, and body language	Higher cost in the form of space, refreshments, and materials
	Builds a stronger relationship with potential clients	Finding an appropriate space for your event
	More control over the environment, including minimizing distractions	Harder to get people to commit to travel
	Authority and prestige from standing the front of the room	

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Best Practices for Hosting Virtually

Virtual events can be great leverage and provide accessibility for those who might not be able to attend in-person. Apply these best practices to ensure a top-notch experience for your attendees:

1. Test and practice with your technology before the day of the virtual event
2. Enable accessibility features such as closed captioning
3. Provide clear instructions and a technology cheat sheet for your guests prior to the event
4. Offer resources that you can share with your guests
5. Promote your brand with your clothing and virtual background
6. Set the default to mute attendees
7. Ask attendees to turn their cameras on
8. Encourage attendees to ask questions via the chat, raising their hand (if the platform has this feature), and/or unmuting themselves
9. Watch the chat and be sure to answer everyone's questions or have a partner answer them privately during the presentation
10. Use breakout rooms (if appropriate) and include members of your team as hosts in each breakout room
11. Have a tech partner handy for troubleshooting

Best Practices for Hosting In-Person

An in-person seminar can be a great way to build connections with your audience. When you choose to host in-person use a few key tips that will make your event great for your audience:

1. Choose a venue that is welcoming and accessible
2. Arrange the seating in advance to align with the format and tone of your seminar
3. If you provide refreshments, include options and signage for those with dietary restrictions
   a. Use lecture hall style seating to create a "sage on the stage" feel
   b. Set up group seating arrangements if you want the seminar to feel like a mastermind or community event
4. Provide handouts or notebooks and something to write with and encourage attendees to take notes as a way to increase engagement
5. Test and practice with any audio-visual equipment

Set the Budget

Treat your budget for the event like an investment and then hold it accountable to a return on investment that is sustainable for your business. Use the money you spend wisely, each dollar should increase the number of attendees or enhance the experience for those who attend to make it more memorable.

Plan ahead for your budget by first deciding how often you will host a seminar and maintain a consistent experience at each event. Items to consider in your budget include:

1. **Venue (In-Person):** This may include a charge for the space and/or a food and beverage minimum spend.
2. **Upgraded Zoom Account (Virtual):** Upgrading your Zoom will allow you to have more attendees, longer sessions, cloud recording, live streaming, and better reporting.
3. **Snacks/Drinks:** The food you provide is a reflection of who you are, so choose wisely. Choose snacks and drinks that can be grabbed before the seminar starts to avoid disruption. Be thoughtful about dietary restrictions.
4. **Door Prizes/Giveaways:** If you are going to give a door prize, make sure you advertise it! The reason you give the prize is to get more people in the door.

On average an in-person event costs anywhere between $50-$1,000 based on any of the factors above. While a virtual seminar costs anywhere between $50-$150.

Partnering with a vendor will allow you to split or cover some of the costs associated with hosting a seminar.

Establish Event Cadence

If Seminars are going to be a top three lead source for your business, you need to consider how often you will host them: quarterly, monthly, or weekly. Best practice is to commit to hosting one per month minimum.
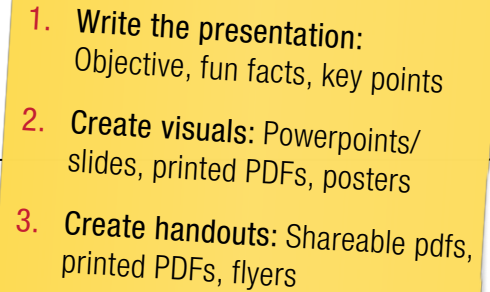
Once you've decided on cadence, you need to choose dates and times. Consider your target audience, the days and times that work best for first-time homebuyers in your market may look very different from the best days and times for investors. Offer varying days and times to accommodate as many attendees as possible.

Pro Tip:

If you intend to make seminars 1 of your top 3 lead sources, host them weekly. Properly prospected to and marketed for, you can plan on each seminar having 10-30 people in attendance.

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Develop Presentation Materials

Whether you're hosting virtually or in person, it's important to plan for what you will be presenting and how.

Note:
1. **Write the presentation:** Objective, fun facts, key points
2. **Create visuals:** Powerpoints/slides, printed PDFs, posters
3. **Create handouts:** Shareable pdfs, printed PDFs, flyers

Next, you need to develop the outline of the event.
Here is an example outline for a First Time Home Buyer Seminar:

	Segment	Contents	Timing
1.	Introduction	Your introduction should be warm and set the audience at ease. The key points here are: 1. Why you have decided to run this seminar 2. Why you are passionate about this topic 3. Why you are qualified to instruct it. You should also make it clear that your seminar is a safe place for attendees to ask questions and learn. Remind everyone that each attendee will have a different level of understanding around the topic and we are all here to support each other and be proud of ourselves and each other for learning, growing, and asking questions.	5 Minutes
2.	Guest Introduction	Invite the attendees to provide a quick introduction to themselves and why they decided to attend. This should be low-pressure and anyone who prefers to remain silent should be afforded the right to do so. Remember this is all about making people feel comfortable.	10 minutes
3.	Present the problem to be solved or the opportunity available	Explain what you will be teaching and why the topic is going to be helpful for your attendees. Best practice here is often to debunk the mythunderstandings on the topic. An example of this in a first-time homebuyer seminar is to debunk the myth that renting is better than buying.	7 minutes
4.	Tell them how you're going to solve the problem or give them the opportunity	We are now into the meat of the presentation. Pick your 3-4 key topics and present them clearly and concisely. Be sure to state the problem and then your solution. Often times a simple pencil drawing/model will help you make complex ideas into simple illustrations.	30 minutes
5.	Call to Action	Have the attendees set up an appointment or fill out a form	3 minutes
6.	Aha's and Questions	Invite the audience to put what they have learned in their own words. This will validate you to the other attendees and provide you with insight into who you connected with and who might be a NOW client. Keep track of the questions you are asked to integrate that information into your next seminar. If one persons asks the question, more likely multiple people have the same question.	5-15 minutes

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Find a Partner

Depending on the seminar that you choose to host, a partner may be a valuable asset. If hosting a First Time Home Buyer seminar, it would be valuable to have a lender partner with you to answer questions about loan types and interest rates. If you're hosting a Home Sellers Workshop, you may rotate your preferred photographer or home stager to talk about the make-ready process. Partners can also sponsor events to help financially.

When choosing a sponsor, you want someone you have chemistry with so when you present together it is informative and entertaining! Your partner should be someone that is an expert on the topic and can keep things simple. Lastly, look for a partner who is as hungry for new clients as you are!

Keller William Resources

Keller Williams offers a plethora of toolkits and ready-to-customize resources you can leverage and curate into the seminar or seminar series that aligns with your audience and branding. Click each title below to access these resources:

1. First-Time Homebuyer Workshop: Use the Your First Home slides, marketing toolkit, and guides in both English and Español from KW Connect or use the updated Your First Home book.
2. Home Sellers Workshop: Watch Sue Adler share her techniques for a Listing Seminar at CEO Masterminds 2022 on KW Connect and use the planning guides from the KWU course No Ceilings Level Up Lead Generation: Virtual Events.
3. Mortgage Hacks: Get your copy of the Mortgage Hacks Playbook and build a seminar series covering different mortgage hacks each month.
4. Investors: Grab your copy of the Millionaire Real Estate Investor and build a 5-year plan for investors that grows from a first home through owning a multifamily unit, vacation property, and commercial or apartment syndication.
5. Real Estate Planning: Take Securing Listings with the Wealthy from MAPS and adapt the knowledge into a slide deck of your own for older adults who need a real estate expert on their estate planning team.

STEP 3: Invite People

The number of attendees will be in direct proportion to the number of people you invite. If you want a large turnout you need to invite a lot of people!

Set Up the Registration Form

Best practice is to use a publicly searchable platform such as Eventbrite for single seminars or Meetup if you are creating a seminar series. This will allow you to have a shareable link that integrates into social media to market and makes registration easy for attendees.
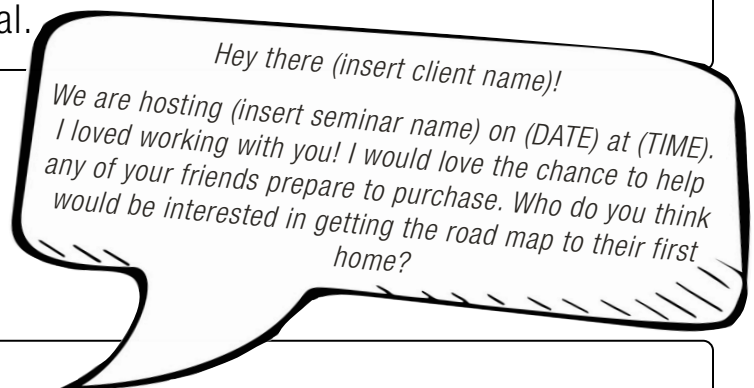
Invite Your Database

Invite your database via text and email so you can include the registration link.

> Hey there (insert client name)!
>
> We are hosting (insert seminar name) on (DATE) at (TIME). I wanted to invite my favorite clients to see if you would be interested in attending!
>
> Here is the link to sign up (LINK). As always, I would love to see you and have a chance to connect!
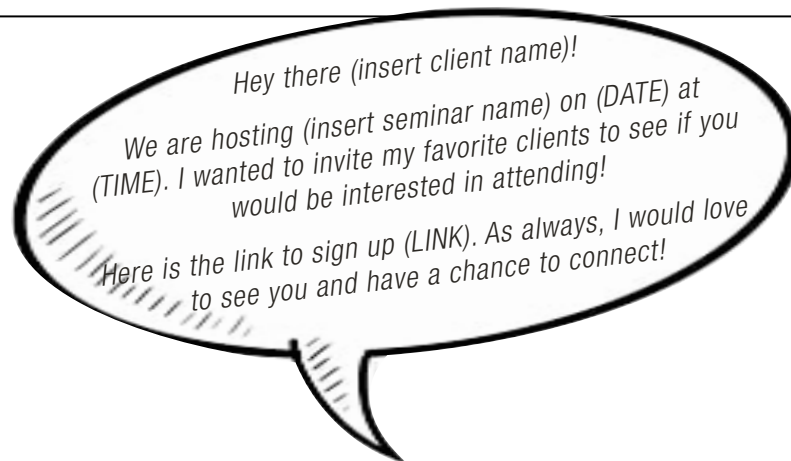
Call Your SOI
Call your SOI to ask them if they know of anyone that may benefit from your seminar. This is an SOI touch that may end in a referral.

> Hey there (insert client name)!
>
> We are hosting (insert seminar name) on (DATE) at (TIME). I loved working with you! I would love the chance to help any of your friends prepare to purchase. Who do you think would be interested in getting the road map to their first home?

Post on Social Media
When marketing on social media add the registration link to your social posts and ads. Follow along to Step #4 to learn how to promote the event.

Reference Tech Play #4, #5, #6, #7 and #1 to learn more about how you can use technology in this section.

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STEP 4: Promote the Event

Promoting your event is one of the most important steps to hosting a successful seminar.

Create Marketing Materials

The more marketing you do, the more turnout you will have. Marketing is your gold to drive turnout and generate new leads in your database. Easily create Email, Social, and Print designs in Command to use when marketing.

Your marketing materials should have key details:
1. Seminar topic
2. Date and Time
3. Location

Market the Event

Market your seminar in 5 easy ways:

1. Post on your personal and business social media pages
   Use a short clip or photos from a previous seminar and ask your friends to share

2. Add to your database newsletter
   If you are currently sending your database a Newsletter, put event details in the Upcoming Events section of your Newsletter. If you are not currently providing your database with a quarterly or monthly newsletter, please refer to the Newsletter Playbook.

3. Run paid social ads
   Use eye-catching visuals to attract consumers to click on your ad.

4. Drop flyers at audience-appropriate locations
   Drop flyers for First Time Home Buyer seminars at apartment complexes or flyers for Real Estate Planning seminars at senior community centers

5. Run ads in newspapers and community newsletters
   When running ads in print marketing, be sure to market an event several weeks in advance to allow ample time for people to register

There is no such thing as too much promotion. Potential clients who are not interested in the seminar will be exposed to your brand through the promotion of your seminar, which makes this a great touch even for those who do not attend.

Reference Tech Play #15, #17, #19, and #20 to learn more about how you can use technology in this section.

Leverage Campaigns in Command to schedule your social posts in advance. Time block once a quarter or twice a year to create and schedule social posts to promote your seminar.
For detailed instructions see Create And Schedule Social Posts in Command on answers.kw.com.

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Examples of First Time Home Buyer Seminar Social Ads

Contact Registered Guests

Follow up with registrations right away to increase attendance and potentially set one-on-one appointments with those who are ready to transact.

1. Send a thank you for registering message that includes the details of your event:
   a. Date and time of the event
   b. Location (either an address or instructions on how to log in for a virtual event)
   c. What participants should bring to the seminar if anything

2. Send a reminder message 2 days before the event with the same details

Pro Tip:

Use a platform like Eventbrite to reduce your work. Eventbrite will send reminder messages to all registered participants 48 hours, 2 hours, and 10 minutes prior to the event.

Reference Tech Play #1, #4, #5, #6, and #7 to learn more about how you can use technology in this section.

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This is the moment you've built towards, time to host your seminar! Whether you are leading a seminar on wealth building through real estate to investors or an introduction to the buying process for first-time home buyers your goal is the same: host a memorable event that feeds your database with new leads.

8 Tips for Winning Seminar

1. Create the environment by telling your audience you want their participation and engagement. Make it clear this is an opportunity for dialogue and questions are encouraged

2. Set the stage by introducing yourself and any team members or vendor sponsors who are hosting with you

3. Have participants introduce themselves and share their intentions for attending. Compare the names of those who introduce themselves to your pre registration list and note anyone whose contact information you do not have from the registration process. Make note of which pre registered individuals attended versus those who do not for your follow-up messaging

4. Lead your seminar as you prepared and rehearsed it. Use the conversation points you have practiced to maintain a relaxed and welcoming tone

5. Engage with attendees. In addition to presenting information, you can also engage with attendees by asking and answering questions, encouraging discussion, and providing personalized feedback. This can help establish you as a helpful and approachable expert

6. Close by thanking attendees and stating your call to action to set one-on-one appointments

7. Collect contact information one-on-one for anyone who attended and had not provided their information via registration

8. Leave time for questions

Use these 8 tips in conjunction with the best practices above for a stellar seminar.

The fortune is in the follow-up! Follow up with both those who attended the seminar and those who registered but did not attend. Remember the purpose of these seminars to meet new people. Some will transaction now and nearly all will transact eventually. If you do not follow up with everyone, you guarantee they will not transact with you.

Follow Up with Attendees

1. If attendees were not automatically added to your database, add them with tags for which seminar they attended and any notes about what they were interested in about the seminar

2. Contact everyone who attended the seminar with a thank you call or text and an email. Invite those who had questions from the seminar to set an appointment with you

3. Add every attendee to a follow up plan based on whether they are a hot, nurture, or watch potential client

> Hi (Client Name).
> This is (name) with KW (Market Center or Team Name). Thank you so much for attending (seminar name). We are so thankful for the opportunity to connect with you. When could you make time next week for an appointment to discuss your lingering questions and options for (seminar topic)?
>
> By the way, who do you know that has real estate questions that also might like to attend the next seminar?
>
> May I have their name and phone number so I can reach out to invite them!

Follow Up with No-Shows

1. Contact every no-show with a call or text, in a TCPA-compliant way, to let them know you missed them in the seminar and to invite them to the next one

2. Add each no-show to an 8x8 New Contact follow-up plan

> Hi (Client Name).
> This is (name) with KW (Market Center or Team Name). We were disappointed we didn't get to see you at our (seminar name). We can't wait to connect at the next one! Please keep a look out for communication on (insert next event name) this (insert Month). In the meantime, when would you be available to discuss (insert seminar topic)?
>
> By the way, who do you know that has real estate questions that also might like to attend?
>
> May I have their name and phone number so I can reach out to invite them!

Reference Tech Play #21 and #22 to learn more about how you can use technology in this section.

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The value of your seminar continues even after the event, but only if you choose to use the content for prospecting and marketing. Use video clips and images to promote your brand as a market expert between seminars and as a funnel to attract more people to your next seminar.

Virtual Seminars

Use the recording to create highlight clips that can be shared on social media. Choose 10-30 second segments that demonstrate your ability to engage the audience without sharing every detail. You want to provide just enough to pique the interest of a future potential client or seminar attendee. This is easier than you might think:

1. Sign in to the Zoom web portal. In the navigation menu, click Recordings.

2. Click the meeting topic for the session that you want to trim, then click the thumbnail of the video.

3. Click Trim. Use the blue sliders to specify the start time and the end time for the trimmed recording. This means that the blue highlighted area will be the trimmed recording, then click Trim to confirm.

4. In the Zoom web portal, where the individual recording is located, click "copy shareable link" to share the trimmed recording with others.

In-Person Seminars

In-person seminars can create great photo opportunities that can similarly be leveraged on your social media and in your print advertising. Have a member of your team or someone you know take flattering photos that position you as an authority leading the seminar and capture 10-30 second bursts of brilliance as video. Create social posts highlighting the value you bring to clients with the photo reel.

Whether you're hosting virtually or in-person, you can continuously market your seminars. Perhaps add a short blurb to your email signatures and listing and buyer packets, put a QR code on your listing signs, and put the link on the back of your business cards.

#4 SEND TEXT MESSAGES SINGLE

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Agents can send a single text message using their chosen system number (Twilio) through Command on desktop. Texts are automatically logged on contact timeline. **Agents can send texts from the Command App through Twilio, their cell phone, or WhatsApp.** Prompts for adding the activity (cell phone or WhatsApp) will appear after returning to Command App.

➡️ ## SEND A TEXT MESSAGE (COMMAND PLATFORM)

1. Open the contact record
2. Click on phone number
3. Choose "Send Text with Twilio"
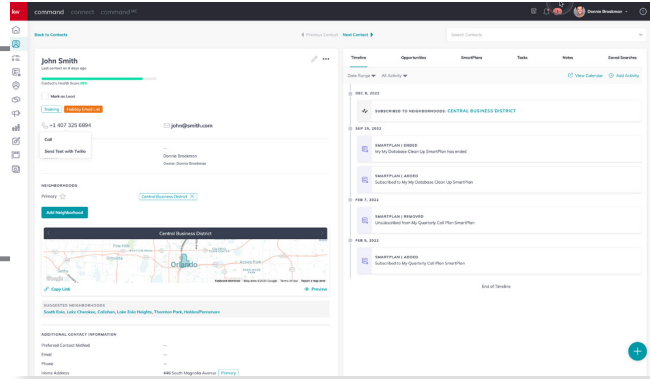
➡️ ## COMPOSE MESSAGE

1. Compose message
   a. Include Emojis (optional)
   b. Include image (optional)
2. Verify and send
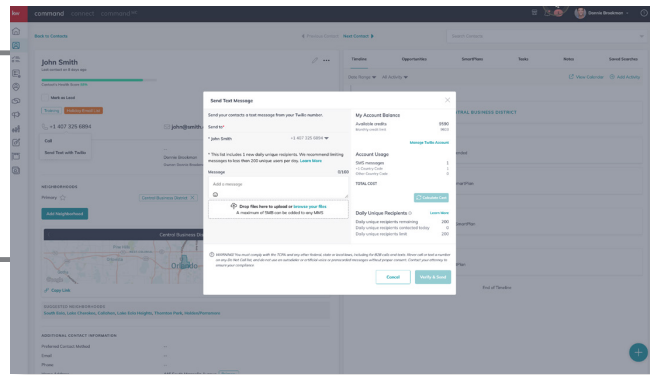
➡️ ## SEND A TEXT MESSAGE (COMMAND APP)

1. Open contact record
2. Tap on "Text"
3. Confirm selection
   a. Send using Twilio
   b. Send using cell phone
   c. Send using WhatsApp
4. Log Activity
   a. Cell phone and WhatsApp only
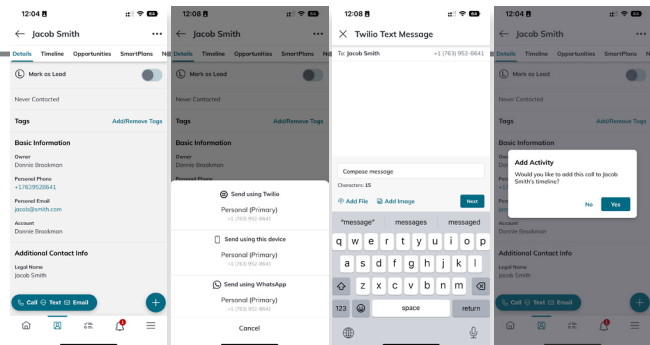
WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.

#5 *SEND TEXT MESSAGES*
BULK

KELLERWILLIAMS.

Command allows agents to send bulk text messages through twilio to **up to 500 contacts at a time.**

SELECT GROUP OF CONTACTS

1. Use filters and sorting
2. Select number of contacts desired

COMPOSE MESSAGE

1. Compose message
2. Add image (optional)
3. Verify and send

#6 SEND EMAIL SINGLE

Agents can send a single email to a contact in Command using their preferred email platform. Clicking on an email address from a contact record will copy the email and redirect the agent to Gmail with the composing email window open. Emails are logged to the timeline if they have their gmail connected in Settings.

➡️ **SEND EMAIL (SINGLE)**

1. Open contact record
2. Click on contact's email address
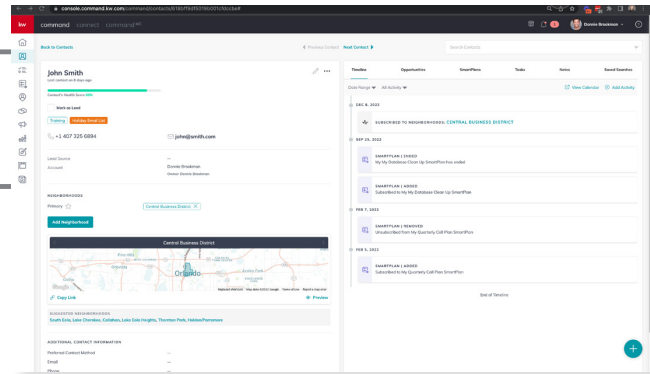
➡️ **EMAIL ADDRESS COPIED**

1. Confirm the email was copied and agent is using KW Gmail
2. Click continue
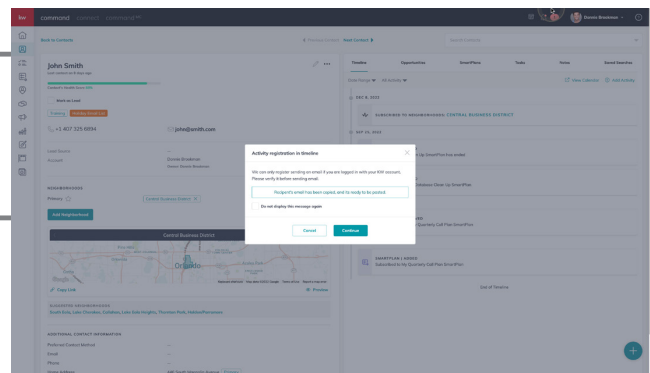
➡️ **COMPOSE EMAIL (GMAIL)**

1. Gmail will open in new tab to compose message
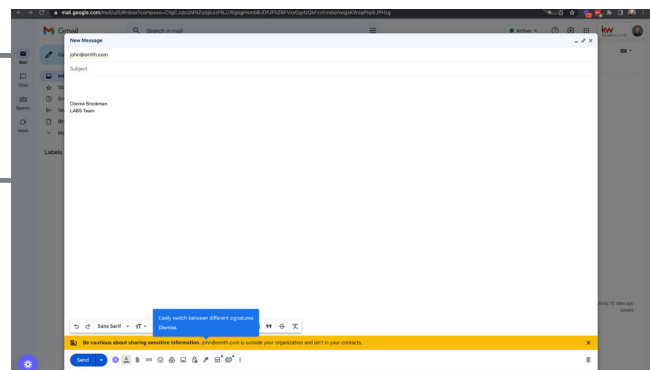
#7 *SEND EMAIL* BULK

Command provides agents up to 5,000 emails monthly with the option to upgrade. Emails can be sent in bulk through an Email Campaign. Email campaigns can use existing templates or custom templates created. Agents can choose to send immediately or schedule for the future. Email lists can be created and saved by contact tags in existing database. Emails campaigns are tracked on individual contact timelines.

→

CREATE EMAIL CAMPAIGN

1. Campaigns Applet > Email Tab > Create Campaign
2. Choose Email
3. Name the campaign and select a goal

→
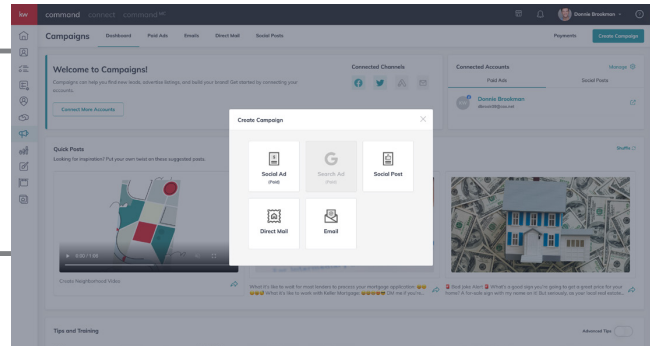
SELECT A TEMPLATE

1. Browse existing templates
2. Create new template from scratch

→
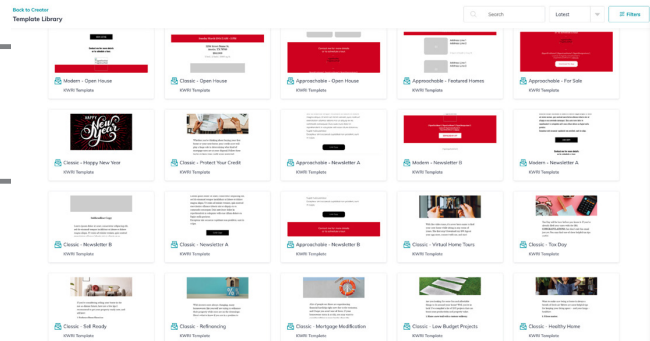
CHOOSE EMAIL LIST

1. Choose previously saved list
2. Create new list
   a. Filter contacts by tag
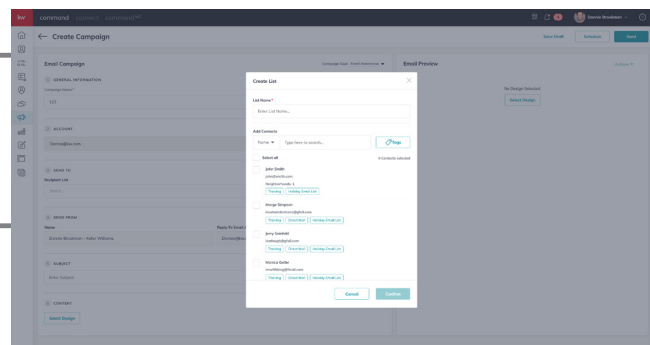
#1

MAKE CALLS
SINGLE

Command offers two ways to make single phone calls to contacts. Agents can use the click to call option on desktop that initiates a call on connected cell phone/device. Agents can initiate calls on the Command App through their device or WhatsApp (common for international calls). All calls end with prompts to log interactions to contact timeline.

→ **CLICK TO CALL**

1. Open contact record
2. Click on phone number
3. Choose "Call"

→ **LOG CLIENT INTERACTION**

1. Log client interaction notes
2. Confirm "Add to timeline"

→ **CLICK TO CALL (COMMAND APP)**

1. Open contact
2. Click "Call"
3. Choose call via cell phone or Whatsapp (common for international calls)
4. Confirm "Yes" to add activity
5. Log notes from interaction
6. Save interaction
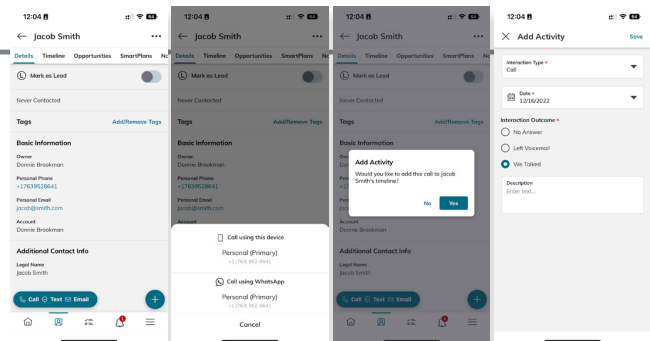
#15 CREATE MARKETING MATERIAL

kw KELLERWILLIAMS.

Command's Designs applet allows agents to customize hundreds of social or print design templates. Preferred materials, DBA logo, headshot, & team images can be saved as custom assets. Select collections offer design automation. Choose open house collection, select listing, provide open house details, confirm agent info, and create six different templates automatically.

SELECT AUTOMATED COLLECTION

1. Browse automated collections on left menu
2. Choose "Auto-Create"
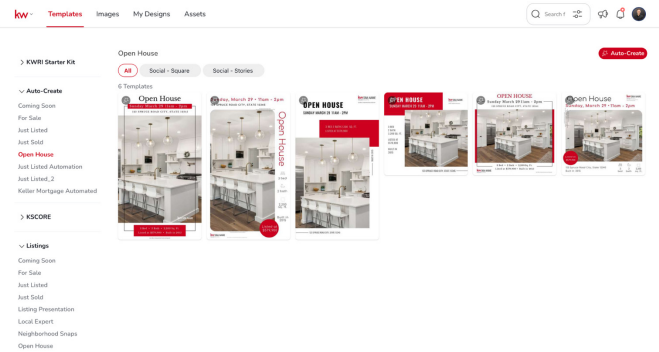
CONFIRM DETAILS

1. Search for Listing
2. Confirm Open House details
3. Confirm property details
   a. Brought in from MLS
4. Confirm Agent info
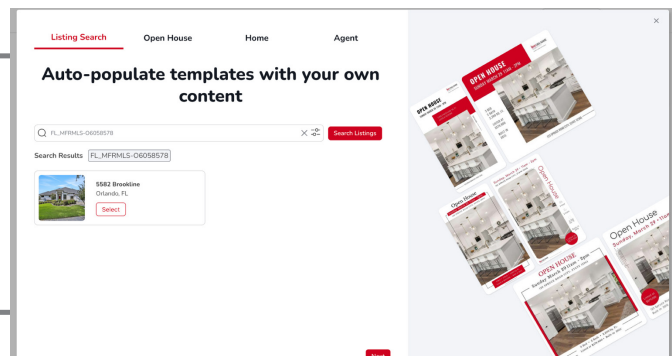
VIEW COMPLETED DESIGNS

1. All templates from collection will be added to folder
2. View, download, or save any template desired

kw Where Entrepreneurs Thrive
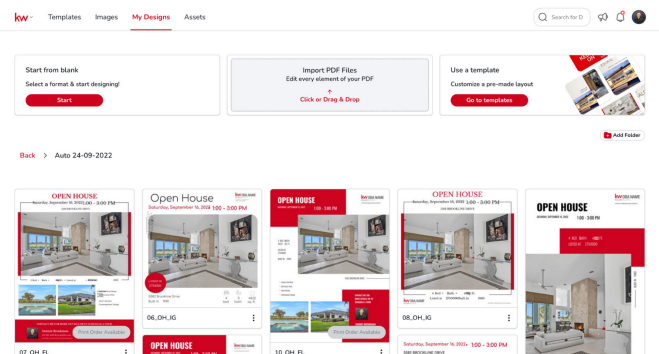
#17 USE MARKETING MATERIAL (PRE MADE)

Command offers a variety of "ready to use" marketing pieces. HTML Email Templates, Social Media Posts, Direct Mail, & SmartPlans are some examples.

→ ## QUICK SOCIAL POSTS

1. Campaigns > Social Posts

2. Browse "Quick Posts" and use share button

3. Choose to publish immediately or schedule post
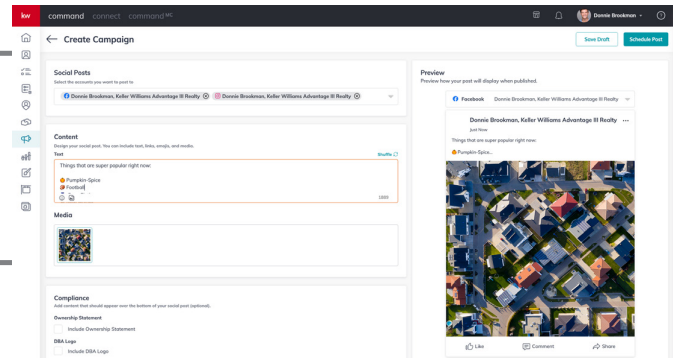
→ ## HTML EMAIL TEMPLATES

1. Campaigns > Email

2. Create Campaign > Email

3. Browse 70+ ready to use templates
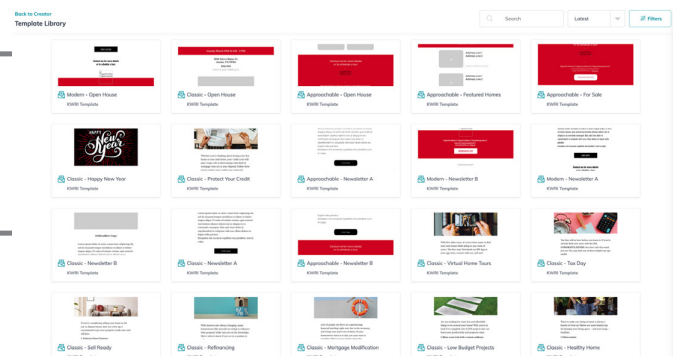
→ ## POSTCARDS AND FLIERS

1. Designs > Create Design > Print

2. Lead Generation category > I ❤ KW
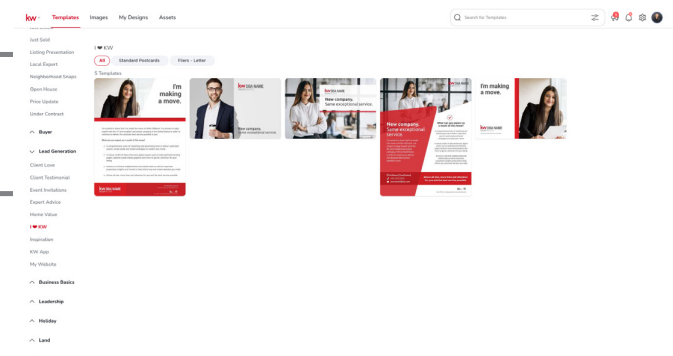
#19 POST TO SOCIAL MEDIA FREE

Create and manage organic reach social media posts through Facebook, Twitter, or Instagram. Media can be uploaded directly from the agents computer or pulled from Designs. Agent's can share ready-to-go "Quick Posts" directly to social platforms with no required editing.

CREATE A SOCIAL POST

1. Click Create Campaign
2. Select Social Post
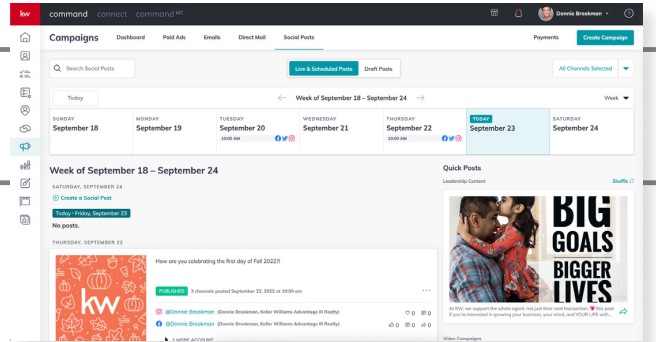
CUSTOMIZE POST

1. Choose Social Channel(s)
2. Write Text
3. Add Media
   a. Upload from computer
   b. Browse from Designs
4. Preview posts by Social Channel
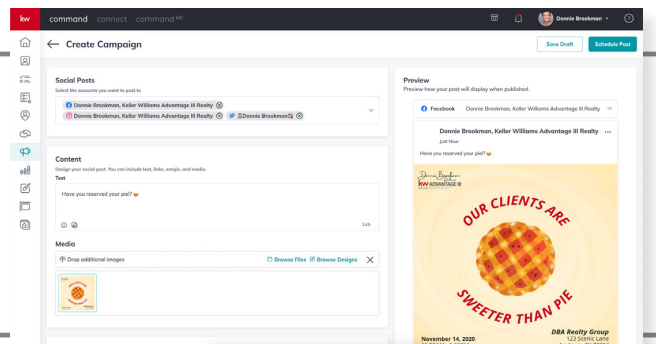
SCHEDULE POST

1. Schedule post by date/time
2. OR Publish immediately
3. Confirm selection
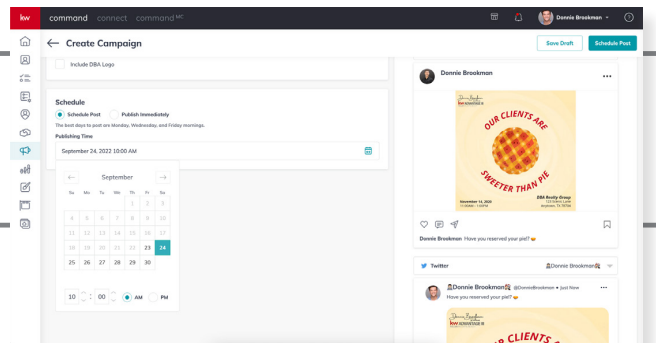
#20 RUN PAID SOCIAL MEDIA ADS

Agents can run social media ads through Command on Facebook, Instagram, Twitter, and Google. Campaigns > Social Ads provides a dashboard to monitor ads and track leads. Leads captured are added to Contacts. Lead settings allow for auto-tagging & triggering SmartPlans. Listings are connected to bring in description and media from MLS.
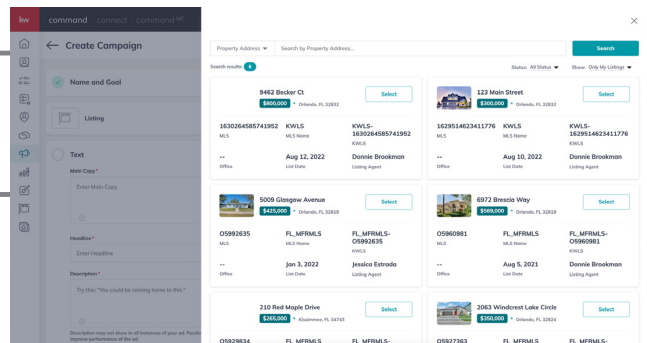
CREATE SOCIAL AD

1. Choose Create Campaign
2. Select Social Ad
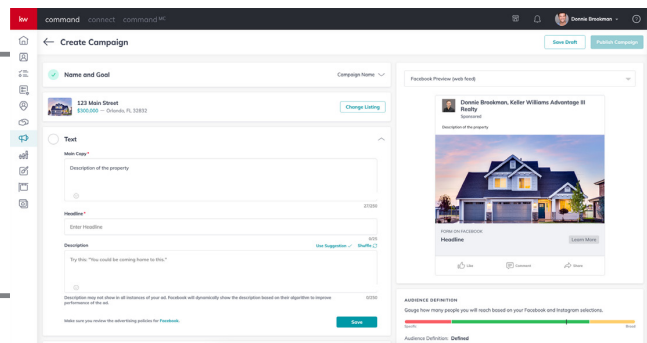3. Name the campaign
4. Choose campaign goal
5. Select Social Channel(s)
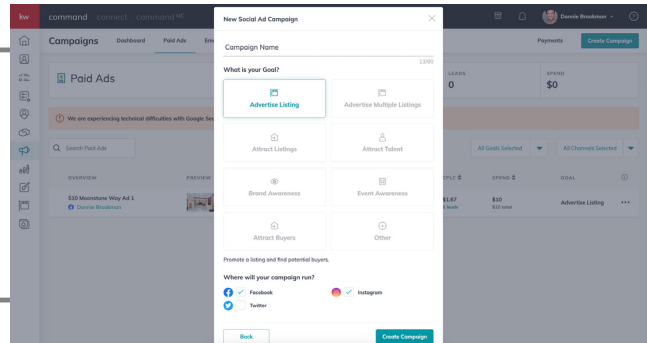
IMPORT FROM A LISTING

1. Browse and select a listing

Photo media and description will pull in from MLS

CUSTOMIZE SOCIAL AD

1. Customize text
2. Customize media
   a. Select multiple listing photos from MLS
   b. Select images from Designs
   c. Upload directly from computer

#20 RUN PAID SOCIAL MEDIA ADS (CONT.)

Agents can run social media ads through Command on Facebook, Instagram, Twitter, and Google. Campaigns > Social Ads provides a dashboard to monitor ads and track leads. Leads captured are added to Contacts. Lead settings allow for auto-tagging & triggering SmartPlans. Listings are connected to bring in description and media from MLS.
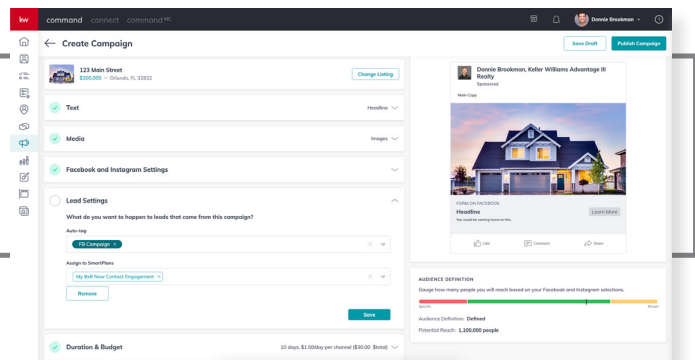
SOCIAL SETTINGS

1. Confirm Social Pages
2. Select Destination
   a. Lead Capture Form - bring lead into Contacts
   b. Site/Landing Page - redirect to external source
3. Audience
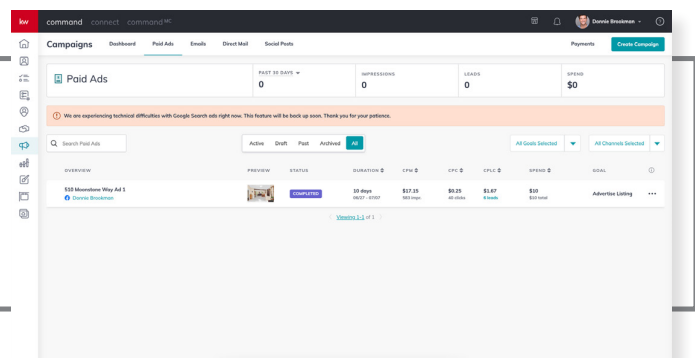   a. Auto, Custom, or Saved
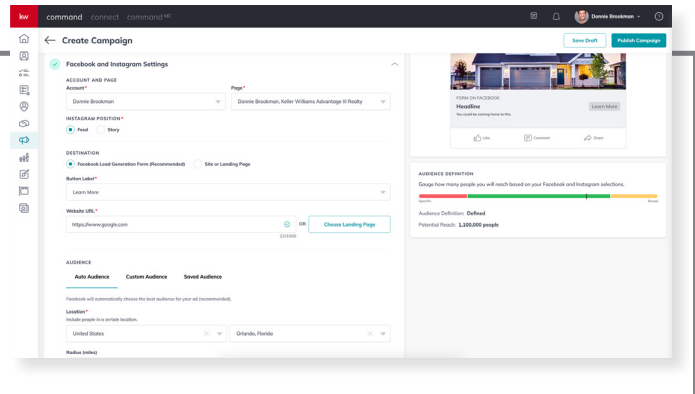
LEAD SETTINGS AND BUDGET

1. Choose contact tag(s) added to leads captured
2. Select SmartPlan(s) triggered for leads captured

MONITOR AD METRICS

1. Dashboard to monitor lead metrics and leads captured
2. Duplicate an ad
   a. Duplicate and run
   b. Customize and run

#21 CREATE FOLLOW-UP PLANS

kw KELLERWILLIAMS.

Command's SmartPlans applet provides an extensive library of follow up plans and the ability to create a custom SmartPlan from scratch. Agents can choose to publish custom SmartPlans for all associates to access a copy. SmartPlan steps can be separated with time delays (days), be set to repeat, or trigger another SmartPlan. Custom tag triggers can be added to automate the activation of a SmartPlan.
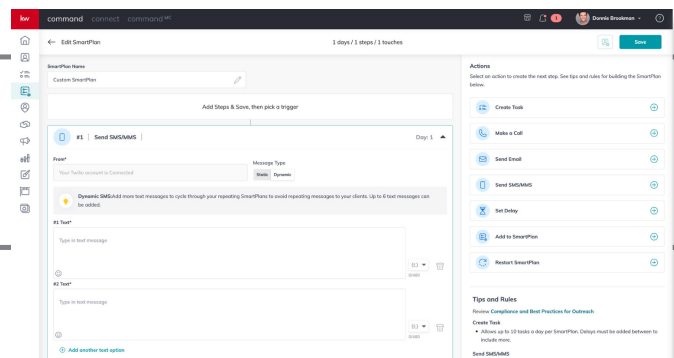
CREATE A SMARTPLAN

1. Open SmartPlans and choose "Create"
2. Add steps from right to customize plan

Teams can also designate an assignee for each step - either Rainmaker or Contact assignee.
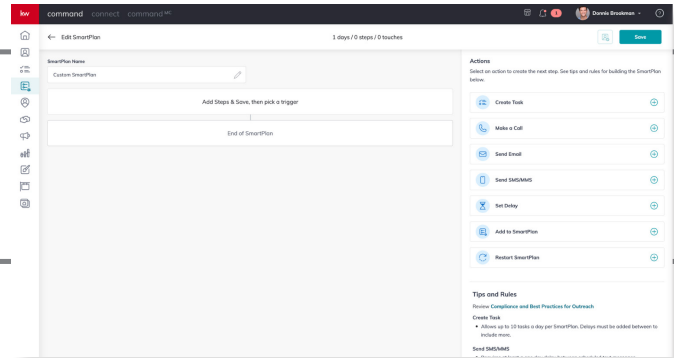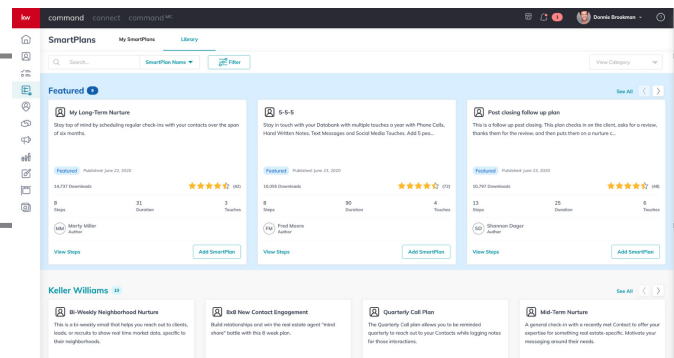
CUSTOMIZE STEPS

1. Send an SMS Step: Dynamic
   a. Dynamic texting will store up to five messages to cycle through as the plan repeats

BROWSE SMARTPLAN LIBRARY

1. Browse agent and KWRI created SmartPlans
2. Choose "Add SmartPlan" to download a copy to your library

#22 USE FOLLOW-UP PLANS

SmartPlans can be applied to contact records individually and in bulk through multiple paths. Options for scheduling the start date of the SmartPlan are available. Stagger start is optional when adding contacts to a SmartPlan in bulk. Stagger start helps manage the number of daily tasks/calls. SmartPlans can be triggered by adding a contact tag and individually set from the Command App.
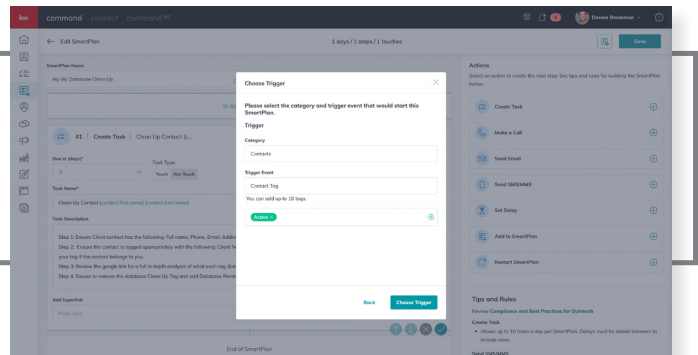
ADD TO SMARTPLAN (BULK)

1. Open Contacts and filter to desired list
2. Select contacts
3. Choose "Add to SmartPlan" from bulk action menu
4. Select SmartPlan
5. Choose Start immediately, schedule to start, or stagger start
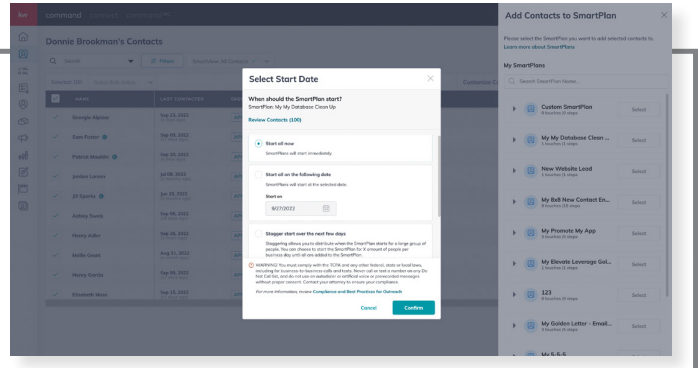
CONTACT TAG TRIGGER

1. Create or open an existing SmartPlan
2. Choose "Add Trigger"
3. Add/create contact tag that will trigger the start of SmartPlan when added to contact

SMARTPLANS (COMMAND APP)

1. Open contact record
2. Select blue + button
3. Choose "Add to SmartPlan"

OR

1. Tap on "SmartPlans" tab
2. Choose blue + and select SmartPlan