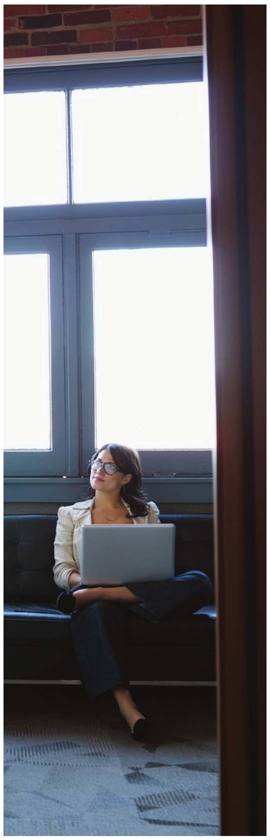

Simpler. Smarter. More Human.

More than a CRM, **Command** is how you optimize, manage and run your business with unprecedented simplicity and insight.

OPPORTUNITIES

FOCUS ON YOUR CLIENT RELATIONSHIPS AND DOLLAR-PRODUCTIVE ACTIVITIES INSTEAD OF TEDIOUS PAPERWORK AND TOGGLING BETWEEN SPREADSHEETS.

Manage your entire book of business - from lead, to close, to your next paycheck - all from a single easy-to-use dashboard that allows you to drag and drop deals between customizable stages.

- See appointments, listings, contracts, closed deals and projected revenue in one place.
- Stay organized with simplified document management, compliance review, real-time collaboration and more.
- See the road ahead with real-time revenue projections and keep tabs on your cash flow.
- Flexible team settings include advanced filtering to gain a holistic view and permissioned visibility into individual member pipelines.

Learn more at **technology.kw.com**

Manage Opportunities Like a Pro

1 Create Opportunities

- [ ] 1. Click "Create opportunity"
- [ ] 2. Complete the opportunity form
- [ ] 3. To complete the process, click "Create Opportunity"

2 Manage Opportunities

- [ ] 1. Edit the opportunity
- [ ] 2. Click "Select from KWLS" to add the listing to the oppportunity
- [ ] 3. Create checklists to track tasks
- [ ] 4. Drag and drop opportunities through phases and stages as the transaction progresses
- [ ] 5. Mark opportunities as lost or archive, as appropriate

3 Work with Offers

- [ ] 1. Create offers
- [ ] 2. Compare and share offers
- [ ] 3. Negotiate offers
- [ ] 4. Accept or reject offers

4 Upload Documents

- [ ] 1. Open the opportunity
- [ ] 2. Click the Documents tab
- [ ] 3. Select the appropriate folder
- [ ] 4. Upload documents
- [ ] 5. Click "Submit to MC" to submit documents for review

5 Submit Commissions

Commissions coming soon!

- [ ] 1. After accepting an offer, click the Commissions tab inside the opportunity
- [ ] 2. Edit fields based on the transaction details
- [ ] 3. Verify fields are correct and complete
- [ ] 4. Click "Submit"

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REALTY

KW Command

CONTACT TO CLOSE

- ADD A CONTACT
- START AN OPPORTUNITY
- LINK/CREATE A DOCUSIGN ACCOUNT
- OPPORTUNITY DETAILS - DEFINITIONS OF TERMS, PHASES AND STAGES
- CREATE A DOCUSIGN ROOM FOR AN OPPORTUNITY
- INTEGRATE ZIPFORMS WITH DOCUSIGN
- EDIT OPPORTUNITY DETAILS WHEN STARTING A TRANSACTION
- CREATE AN OFFER
- SUBMIT COMMISSIONS FOR AN OPPORTUNITY
- ADD A COMPLIANCE DOCUMENT TO AN OPPORTUNITY
- WRAP UP AN OPPORTUNITY

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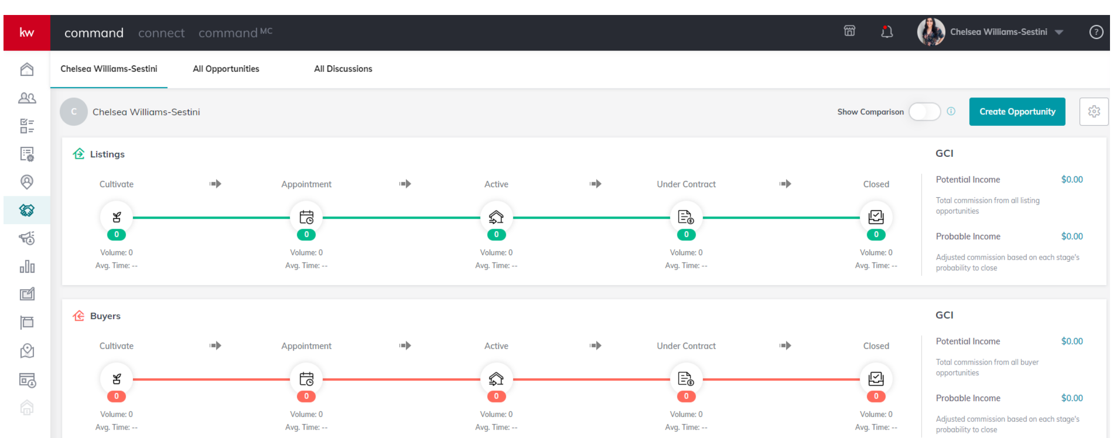
Opportunity Details

Definitions of Terms, Phases and Stages

Definitions

- **Market Center**
- **Team -** Select the team you want to associate with the Opportunity
- **Opportunity Type -** Choose the Pipeline based on the type of transaction
- **Owner (Teams) -** During the transaction process, the Owner of the Opportunity will stay the same but it can be assigned to different team members.
- **Client** - An Opportunity must be associated with a contact.
- **Co-Seller -** You have the option of associating a second contact with the Opportunity, if the second contact is involved in the transaction.
- **Opportunity Name** - This is automatically defaulted with the Opportunity Type and the last name of the primary contact. This field can be edited at any time.
- **Custom Tags -** Allows you to add searchable terms to the Opportunity, so that you can easily find and manage it later.
- **Estimated Closing Date** - Select the expected closing dare using the calendar widget.
- **Time Frame (Buyer Only)** - Select in months
- **Budget or Estimated Time Frame** (Based on Buyer or Seller)
- **Commission Rate** - This can be changed later but is required.
- **Opportunity Phase and Stage -** Opportunities allows you to customize your transaction workflow in the system, to fit your business. See below for more explanation.
- **Assignee(s) -** Assign members of your team to this Opportunity. Anyone who is assigned will have access to view and manage the Opportunity details, and will be added to the DocuSign Room for this Opportunity.

Phases and Stages



Cultivate	Appointment	Active	Under Contract	Closed
• Watch • Nurture • Hot	• Scheduling • Scheduled • Kept	• Staging • Showing • Negotiations • Legacy	• Escrow • Inspections • Appraisal/ Financing • Clear to Close	• Closed • Legacy - these are loops imported from Dotloop

Phases

- Stages

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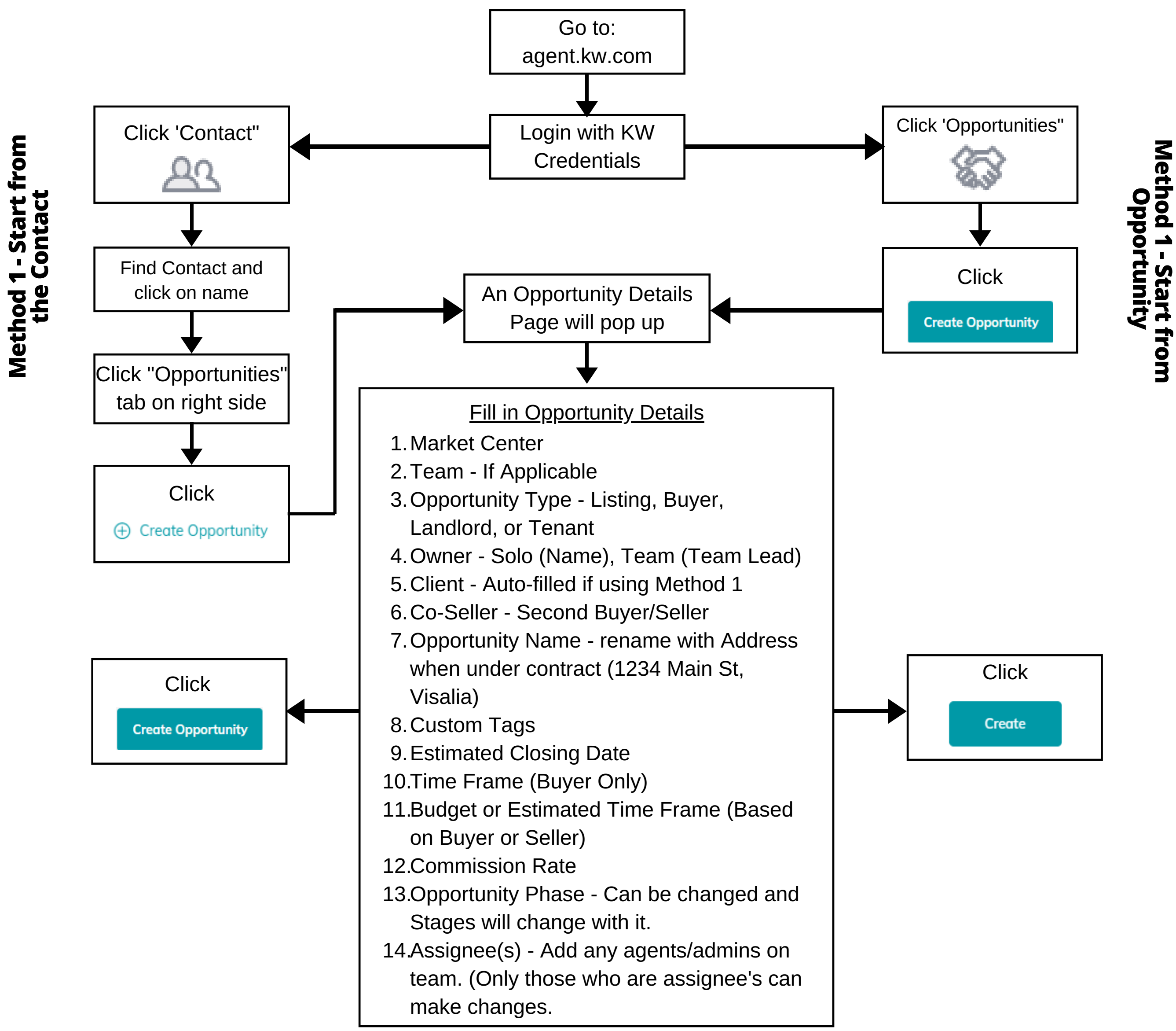
Previous Page - Add A Contact
Next Page - Link/Create a DocuSign Account

How To:

Start an Opportunity



IMPORTANT:
If you are a team lead, make sure you do this first to be able to see all the opportunities created by your team. Once an opportunity is created, the ownership of that opportunity CANNOT be changed.

- From the Home Page of KW Command in the Team Lead ("Rainmaker") Account, go to the top right where their picture/logo is and click on it.
- Then click "Settings"
- This will take you to the Settings page, where on the left hand side it should have a section called "Sales Pipeline" and click on it.
- It should have a drop down called "Team Permissions". That should be clicked to "No"

This means that none of your team members will be able to create "private" opportunities. You will be able to see every opportunity they make. Once an opportunity is created and the Team Lead is NOT the owner, it cannot be changed.

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Previous Page - Integrate ZipForm with DocuSign
Next Page - Create an Offer

How To:

Edit Opportunity Details when starting a Transaction

Getting There

Go to: agent.kw.com → Login with KW Credentials → Click 'Opportunities' → At the top of the page, Click All Opportunities → Click the Blue Opportunity Name

General Information

Click (edit) →

- Opportunity Name - Change to Property Address
- Assignee(s) - Add/Remove any team members or admins that will allow them to make changes
- Custom tags - Add/Remove any tags that pertain to the transaction
- Opportunity Phase - This can be changed to 'Under Contract'
- Stage - This can move it around in the transaction
- Time Frame Months (Buyers)
- Estimated Closed Date
- Appointment Scheduled
- Appointment Date
- Agreement Won
- Contract Date - Acceptance Date
- Closed Date - Actual Close Date
- Estimated Listing Price (Sellers)
- Budget (Buyers)
- Commission Rate - The commission rate being taken
- Finance Type (Buyers) - Conv./FHA/VA/USDA/Owner Financing/Other

→ Click Save

Property

(edit) →

- Country
- Address Line 1 - Property Address
- City/Town
- State/Province
- Zip/Postal Code

→ For Sellers, this will be autofilled with their property address. For Buyers you can input.

Seller Worksheet

Click (edit) →

- Buyer's Agent Commission - %
- Seller's Agent Commission - %
- Seller Closing Costs - %
- Mortgage Balance - $
- Second Mortgage Balance - $
- Prorated Taxes - $
- Prorated HOA dues - $
- Show Net on Offer Comparison? This will allow the seller to see a comparison when an offer is inputted

→ Click Save

Previous Page - Submit Commissions for DA
Next Page - Wrapping up an Opportunity

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How To:

Add a Compliance Document to an Opportunity

Getting There

Go to: agent.kw.com → Login with KW Credentials → Click 'Opportunities' → At the top of the page, Click 'All Opportunities' → Click the Blue Opportunity Name

Choosing the template

Click the 'Documents' tab → Click Pick checklist type → Choose the corresponding template

- IF the listing agent and buyers agent are both inside the Market Center, each agent has to do their own file. There is no way to connect two KW Command Opportunities.
- IF the listing agent is representing both sides, the agent will have to create two Command Opportunities BUT under the buyer side they don't need to upload a second set of documents just create an Offer and submit a Commission.
  - Click the Residential "Dual Agency" template

Single Document Upload

Scroll through the list and find the document placeholder you would like to upload to → Click + Add a file → This will bring up a pop up box asking for the Source of the Documents

Multiple Document Upload

In the middle of the screen, Click Attach multiple files → This will bring up a pop up screen with a list of documents that can have items attached and: Manual / DocuSign / Custom Folders

SOURCE OF DOCUMENTS

Manual - Click "Browse" this will allow you to pick documents from your computer. Pick the document and then open.

DocuSign - This will show all the documents in the Room. Click the bubble next to the document to choose.

Custom Folders - If you use these folders to upload documents to, this is available.

Click Attach → After all documents have been attached. Click Submit to MC

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How To:

Create an Offer

Getting There

Go to: agent.kw.com → Login with KW Credentials → Click 'Opportunities' → At the top of the page, Click All Opportunities → Click the Blue Opportunity Name

Start a new Offer

Click the 'Offers' tab → Click Add New Offer → This will allow you to rename the offer from "Initial Offer" → Click Create Offer → Repeat as needed for multiple offers

Add Offer Details

Offer Details

- Version Name - Initial Offer
- Offer Date
- Closed Date

Click Parties >

Parties

- Fill out Buyer and Seller name
- Email, Phone, Fax, Address as available
- Fill out Agent's names, Email & Phone

Click Terms >

Terms

- Cash
- Finance

The total price can't be altered. Cash & Finance have to add up to it.

- EMD
- Any other Fees

Click Agent Analysis >

Agent Analysis

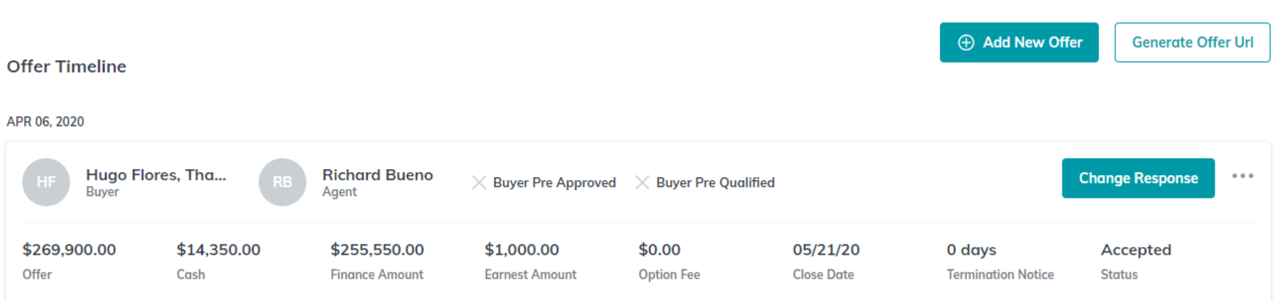
- Pros
- Cons
- Summary

Click Save

Click Accept / Reject

For each offer, but one has to be accepted

Offer Timeline



In the future, this feature will allow you to click the three dots on the right of the offer and 'Add Negotiation'. This will allow you to change the offer and commission as needed for instances like change in Purchase Price due to Appraisal or Negotiation.

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Previous Page - Create an Offer
Next Page - Add a Compliance Document

How To:

Submit Commissions for DA

Getting There

1. Go to: agent.kw.com
2. Login with KW Credentials
3. Click 'Opportunities'
4. At the top of the page, Click 'All Opportunities'
5. Click the Blue Opportunity Name
6. Click 'Commissions' Tab

Start Commissions

Commissions Tab will be greyed out under an Offer is Accepted

Check to make sure Terms are correct. These are pulled from the 'offers' and 'details' tab

1. Sales Price
2. Commission - % and $
3. Contract Date
4. Closed Date

IF APPLICABLE Add Co-Broker Payment

Single Agent

Double Check that Royalty & Company Commission is correct

If you need to add a Bonus, Concession, Deduction, Inside Referral, & Outside Referral

Click ⊕ Add Item

Continue inputting until the Commission balances

Multiple Agents

In order to activate the 'Add Agent' function, the total commission under the first agent needs to be less than the Total Commission

Ex. Total Commission =$6,000, change to $5,900

Scroll Down to the bottom and click ⊕ Add Agent

Type the agent's name in from the drop down and click 'Add'

If needed to relay information Click ⊕ Add Note

Click Submit

More about Add Items

- **Bonus (credit):** this is an additional fixed amount added to the standard commission amount normally as an incentive on offers in a specified time frame.
  - Homebuilders who offer an additional amount on top of % commission.
- **Concession**: an amount of the commission generally owed to the agent but waived in order to get the deal to close.
  - Used in cases like paying for a Home Warranty or paying towards client costs or inspections.
- **Deduction (debit):** payment for an expense incurred by the agent, paid from the agent's net commission by the MC.
  - Used in cases like Market Center Transaction Fee or Transaction Coordinator Fee
- **Inside Referral:** a portion of the commission that is sent to an agent inside your MC.
  - Used in cases like referral fees sent agents inside the Market Center such as Productivity Coaching or Showing Fees.
- **Outside Referral:** Referral fee that is sent to another broker.
  - Used in cases of a referral fee being paid to another brokerage.

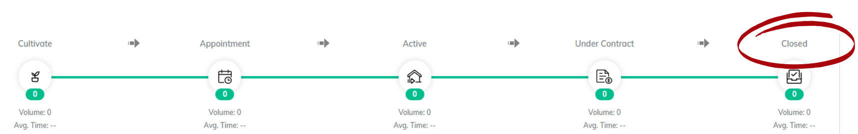
How To:

Wrap Up an Opportunity

- Once documents have been submitted to Compliance, you cannot resubmit more documents until the Compliance Coordinator has either Approved or Returned the first set of documents.
  - IF the documents have been Approved the file status will change to a Green 'Approved'
  - IF one or all of the document has been Rejected the file status will change to a Red 'Returned'
    - Scroll down to the documents that have been returned and there will be a comment next to it.
    - Resubmit documents as needed until all documents have been Approved

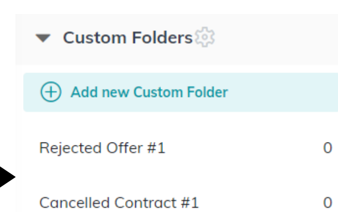
Closed Opportunity

- When an Opportunity has been 'Closed', make sure you change the Opportunity Phase and Stage to 'Closed'
- All Opportunities that have been 'Closed' will be hidden at the end of the month but still can be found by searching the address.



Lost Opportunity

- If a Contract has been Cancelled, this would be considered a 'Lost' Opportunity
- This means that you will have to start a new ' Opportunity'
  - Make sure you are using your 'Custom Folders' to keep all Cancelled and Rejected Offer Documents.



Lost Opportunity

- If you have created an Opportunity by accident and want to get rid of it, you will have to 'Archive' it.
- This can be undone as well by going into your Profile Settings and under 'Command Settings', click 'Opportunity Archive'
  - This will show you every Opportunity that has been archived and allow you to reverse it.

Click on the three dots in the right corner of the Opportunity

Click

Listing Checklist

Cultivate	**Watch Lead - 5%** Get Phone Number Of Lead Get Email Of Lead Get Address Of Lead	**Nurture Lead - 7%** Follow-Up Call Put Seller On Drip Campaign Send A Call To Action- Phone Call, Email, Direct Mail	**Hot Lead - 10%** Contact Seller To Set Listing Appt.	
Appointment	**Scheduling Initial Appt - 10%** Update Database Update Opportunity Details Start to Create Listing Folder Create Listing Presentation Create/Find Comps	**Initial Appt - 30%** Send Reminder To Seller for Upcoming Appt. Obtain Signature on contract & SELM?	**Contract Appt - 35%** Put Together More Comps (if applicable) Outline Cost of Sale Create Folder With Contracts	**Post Appt - 40%** Send SELM to MLS Within 48 Hours Of Contract Signing Order Preliminary Title Report Follow-Up With Client - Provide Tips for Selling Take Photos with Phone Post/Announce Coming Soon
Active	**Prepare Listing - 45%** Send Copy Of Contract To Seller Clean Up House Stage House Schedule Photography Session Compose Ad Copy Start Creating Listing on MLS Get Photos From Photographer	**Publish Listing - 50%** Put Up For Sale Sign Upload Pics (All Sites) Publish Listing on MLS Create Flyers Create Just Listed Graphics for Social Media Post Just Listed Graphics Link KLWS Listing to Opportunity Once Active In Pipeline Update Any Opportunity Details	**Showing / Open House - 70%** KW Office Caravan MLS Caravan Schedule Open Houses Update Seller on Marketing Efforts Email New Listing to Sphere Add Open House Leads to Database Add Hot Buyer Leads to Buyer Opportunity Create Social Media Ads Follow Up on Buyer Leads	**Negotiations - 80%** Price Reduction? Change Price on MLS (If Applicable) Add Received Offers Into The Opportunity Compare Mult. Offers for Seller Create Offer Comparison To Seller Review Offers With Seller Send Counter Offers Accept an Offer Update Accepted/Rejected Offers in Opportunity
Under Contract	**Escrow - 90%** Congratulate Call / Email Seller! Send Copies of Contracts To Seller Update MLS (Under Contract) Seller Complete Disclosures Prepare Greensheet Have Seller Complete SI & HOA Order Order NHD Report	**Inspections - 90%** Update Seller with Inspection Date & Times Verify Smoke & Carbon Monoxide Detectors are Installed Verify Water Heater is Braced Properly Request for Repairs 9A Certification & Retrofit Inspection (If Applicable) Prepare AVID - Obtain Signatures	**Appraisal / Financing - 90%** Update Seller of Date/Time of Appraisal Confirm Appraisal Value Clear Appraisal Conditions Remove Appraisal & Loan Contingencies Update MLS (Pending) When All Contingencies Have Been Removed Confirm With Escrow (1) Week Before Close Of Escrow That There Are NO Outstanding Conditions	**Clear to Close - 90%** Remind Seller To Switch Off Utilities Order Client Closing Gift!
Closed	**Closed - 100%** Update MLS & Database Add People Involved in Transaction to Database Create "Just Sold" Cards / Marketing Take Sign Down From Listing Deliver Closing Gift to Seller Send Thank You Card To Buyer's Agent Ask for a Referral / Testimonial Set up Client Follow-Up Schedule for Seller			

Buyers Checklist

Cultivate

Watch: 5%

1. Do: Obtain email address
2. Email: Tell our story
3. Do: Obtain phone number
4. Do: Obtain current address

Nurture: 7%

1. Call: Follow-up with contact after initial contact made
2. Command: Add to SmartPlan

Hot: 10%

1. Email: Refer to lender partners
2. Call: Identify search criteria
3. Email: Send CTA

Appointment

Scheduling: 10%

1. Do: Create client folder (1 divider)
2. Print: Buyer Discussion Topics
3. Print: Buyer Consult
4. Do: Conduct Buyer Pre-Qual
5. Call: Schedule Buyer Consult
6. Command: Add Buyer Consult to Opportunity as Activity

Scheduled: 20%

1. Command: Start Transaction
2. DocuSign: Send basic disclosures
3. Do: Run preliminary Lien Search
4. Text: Confirm appointment
5. Mail: Thank You card to referrer (if applicable)

Kept: 30%

1. Mail: Thank You card
2. DocuSign: Obtain signatures on EBBA & ABD
3. MLS: Create Auto-search
4. Do: Prepare Buyer Folder Front Sheet

Active

Searching: 50%

1. Discuss: Agency & Compensation
2. Discuss: Process overview, expected costs, and mortgage pre-approval
3. Discuss: FSBO & New Build contacts and search changes
4. Discuss: Desired honesty level
5. Discuss: Policy on working hours and being "present"
6. Discuss: "What I Cannot Tell You" and presence of surveillance
7. Command: Update Opportunity details

Showing: 70%

1. Discuss: What buyers should look FOR and what to look PAST
2. Discuss: Policy on go vs no-go and the ability to come back
3. Discuss: Home inspections and what to request in ATAC
4. Discuss: How title can be held & types of deeds
5. Discuss: Emphasize full disclosure to lender
6. Discuss: Who closing attorney represents and who will be used
7. Discuss: Earnest money
8. Discuss: Home warranties
9. DocuSign: Send blank PSA
10. Discuss: Components of an offer & personal letters

Negotiations: 80%

1. MLS: Pull disclosures from Listing Agent and add to loop
2. Call: Identify what's important to the seller
3. Do: Prepare Offer Prep Checklist
4. DocuSign: Complete offer & share
5. DocuSign: Add VA to room
6. Order: CTC Service from VA
7. Discuss: Cyber fraud & wiring
8. Discuss: Reminder about home inspections & ATAC
9. Future Pacing: Prep for cold feet
10. Future Pacing: Reticular activator & referrals
11. Command: Add parties to Contacts
12. Command: Add offers to Opportunities

Under Contract

Inspections: 90%

1. Call: Congratulate Buyer
2. HomeKeepr: Add client
3. ShowingTime: Schedule Inspection
4. Discuss: Measurements at insp.
5. Do: Obtain & deposit Earnest Money
6. HomeKeepr: Add property info & scan product tags
7. Email: Obtain inspection report
8. Discuss: Concerns from inspection
9. DocuSign: Execute Amendment
10. Command: Update Opportunities with property info
11. DocuSign: Contract to Lender
12. DocuSign: Contract to Attorney

Appraisal: 90%

1. Do: Verify Earnest Money deposit confirmation in loop
2. Discuss: Transfer of utilities
3. Discuss: Start packing NOW
4. Email: Information on homeowner's insurance
5. Email: Info on home warranties
6. Email: Notify Listing Agent of clearing appraisal contingency
7. Command: Submit Commissions
8. Order Home Warranty (if applicable)
9. Email: Coordinate closing time

Clear to Close: 90%

1. Discuss: What happens at closing
2. Email: Suggestions for a "Day 1 Box"
3. Do: Submit Pay at Close
4. DocuSign: Execute ITCA/CCA
5. Email: Verify utility transfers in place
6. Equipment: Prepare Closing Folder
7. Equipment: Take keyring to closing

Closed

Closed: 100%

1. Command: Upload ALTA
2. Do: Turn in checks to office
3. Command: Update addresses for Buyers
4. Command: Move Buyer to new SmartPlan
5. Discuss: Permission to post photo
6. Social Media: Post photo with Buyer
7. Mail: Thank You card to Listing Agent
8. Mail: Check & Thank You card to referrer (if applicable)
9. Discuss: Request testimonials
10. Do: Publish testimonial
11. Do: Prepare Homestead Exemption letter & envelope
12. Do: Print final Folder Front Sheet and archive folder