




kw | Technology

To-Do List for Your First 30 Days

eAgentC | eEdge

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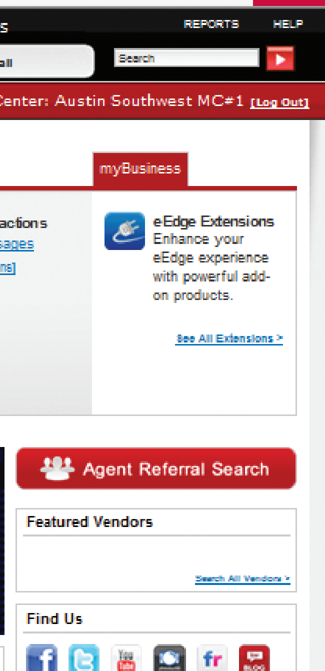


Innovation with purpose.

Technology with an edge.

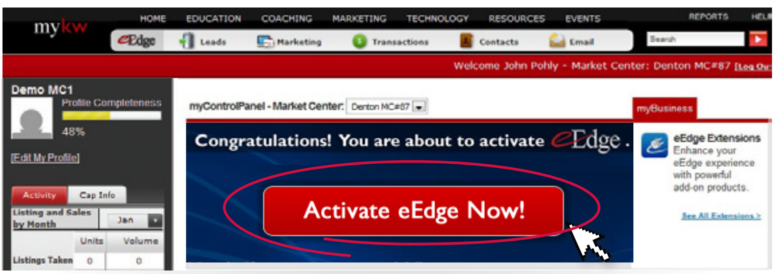
To succeed in real estate, you have to stay on the cutting edge. And in today's market, that means using technology to maximize your productivity. Keller Williams empowers you with profit-boosting tools.

This guide will serve as your task list for the next 30 days and upon completion you will have the technology tools you need to power your business.

Create a home base for your business

*Activate **myControl Panel***

The myControl Panel has everything you need, right where you need it, including access to all of your technology tools. Access your KW email, lead alerts, marketing activities and transaction to-do's in one place, eliminating the need to constantly log-on to multiple systems in order to keep up with your day-to-day business.



Features:

- Never miss out on a lead; your new lead notifications appear under myLeads in addition to text and email alerts.
- Have direct access to all marketing campaigns, materials and websites under myMarketing.
- Manage and edit your contacts under myContacts. Buck upload new contacts with ease.
- Stay on top of client communications with myEmail new message notifications.
- Take advantage of a fully electronic transaction process through myTransactions.

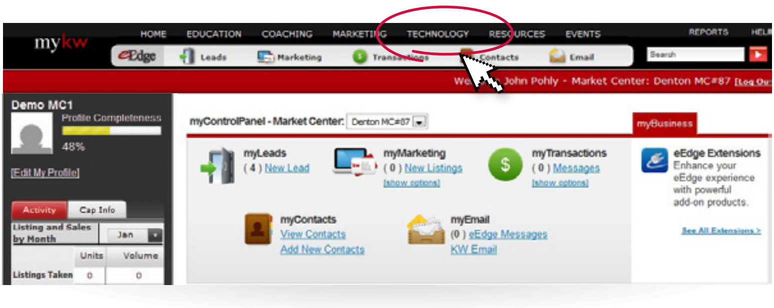
To Do:

1. Log in to mykw.kw.com. Click 'activate eEdge Now' (if you are on a team, speak with your lead agent first as there are options to consider).
2. Click 'Yes' to get started with the activation.
3. Click 'Activate your eEdge account'.
4. Complete all required information. In the 'Contracting Party' field, enter your own name.
5. Be mindful when setting up your eEdge email name, as this will also serve as your eEdge website domain and your choice will be final.

Open up your lines of eCommunication

*Set up **myEmail***

As a KW agent you get not just one, but two email addresses to fully customize with signatures and stationary to fully reflect your brand. Your eEdge email will serve as your line of communication with leads from your eEdge website, while your kw.com email can be used for all other purposes.



To Do:

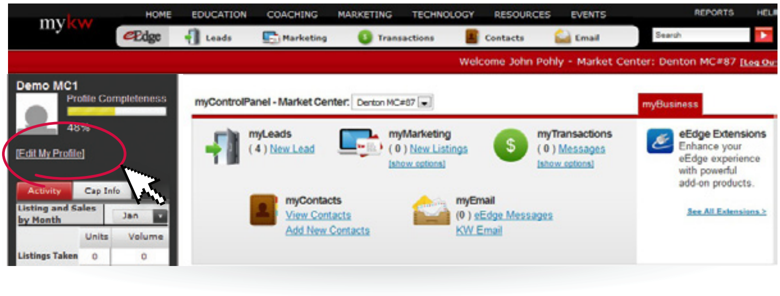
Your kwrealty.com eEdge email was set up during your activation process, so you just have your kw.com email left:

1. Under the 'Technology' tab, click on 'KW Email'.
2. Click on 'sign up'.
3. Follow the instructions to follow step-by-step.

Be found

*Complete **myProfile***

At Keller Williams Realty, we know that every agent brings a specific expertise, a special niche, that "certain something" that's just what certain clients and referring agents are looking for. Your agent profile on kw.com allows you to provide these prospects with all of the information they need to choose you as a real estate partner.



To Do:

1. In mykw.kw.com, click on 'Edit My Profile' just below 'Profile Completeness'.
2. Click on 'edit' under each column and fill in the blanks with appropriate information.
3. Once your Profile Score reaches 100% you are done.

Build your database–Build your business

Add Names to ***myContacts***

myContacts allows you to track and tally each of your clients and all your communications with them. Plus, it's fully integrated with all of your other KW systems. From the time a new lead comes in, throughout your marketing efforts, to the moment the final closing papers are signed, all of your client data is stored in ONE place.

Features:

- Complete contact management that tracks record history for easy reference.
- Reminders can be added to keep you organized.
- Allows organization of contacts through a grouping option for targeted marketing purposes.

To Do:

Import your contacts in one of three ways below. Detailed instructions can be found in the eEdge 101 Training Guide located on the eEdge page under Resources on mykw.kw.com.

1. Import contacts using the Easy Wizard (Outlook, Top Producer or MyRedTools) by exporting your contacts into a CSV file.
2. Import contacts using a template (any other system) by exporting your contacts into a CSV file and downloading the appropriate import template from the import page.
3. Add contacts manually by clicking 'Add Contact' in the myContacts dashboard and filling out the person's contact information.

Cast your net on the Web

Set up my websites in ***myMarketing***

With the overwhelming majority of today's buyers starting their search for homes on the web, it's critical that you have a website and present yourself as the premier expert for finding real estate in your area. At KW, you receive TWO top-of-the-line websites designed to help you do just that. In the world of the web, the wider the net, the greater the catch!

Features:

eAgentC website:

- Website provides IDX Solutions; add it today to stay on top of area listings.
- Add local market information directly on your personal Website with TruliaStats, another great way of increasing visibility online.

eEdge website:

- Also provides IDX Solutions powered by Market Leader.
- Search engine optimized so when consumers use Google to search for properties in their area, your site will rank higher in the search results.

To Do:

eAgentC website:

1. Under the myMarketing tab, click on 'show options'.
2. Click on 'manage eAgentC website' in the drop down menu.
3. Follow instructions step-by-step.

eEdge website:

1. Under the myMarketing tab, click on 'show options'.
2. Click on 'manage eEdge website' in the drop down menu.
3. Follow instructions step-by-step.

Put an end to your marketing madness

*Kick-off a 33-Touch in **myMarketing***

As a real estate agent, your focus is getting in finding and serving clients – NOT creating and managing marketing campaigns. With myMarketing, you have access to customizable presentations, fliers, postcards and automated touch campaigns for everyone in your database, from "haven't mets" to long-time clients.

To Do:

Setting up contacts for the 33-Touch

1. Under the myMarketing tab, click on 'Market Me', then 'Contacts', then 'Manage Groups'.
2. In the field for 'Create New Groups', add a name (ex. "33-Touch").
3. Click on 'Add a Contact', then complete the fields.
4. After contact is saved, scroll down, click on 'Groups', the click on 'Add Groups'.
5. Check the box for the Group you added earlier, then click 'Add'.

Adding the contacts to the Campaign

1. Click on 'Create Marketing' in the left-hand navigation.
2. Under KW Automated Marketing Campaigns click on '33-Touch'.
3. Click on 'Marketing to My Sphere', then '33-Touch Campaign', then 'Select'.
4. Give this Campaign a name and click 'Next'.
5. Select 'Groups' on the next page, then select the Group you created and click 'Save', then 'Start'.
6. Now are you are ready to start your 33-Touch. At this point you can make any adjustments and changes to campaign copy, timing, etc.

Optimize your listings online

*Enter my listings in KWLS in **myMarketing***

The Keller Williams Listing System (KWLS) allows you to market your listings online when you want, where you want. By entering your listings into the KWLS, your properties receive free international exposure on the Web through kw.com, market center Websites, your eAgentC Website, eEdge Website, and all of our 340+ listing partners.

Features:

- Include the marketing benefits of the KWLS in listing presentations to alert potential sellers about the extra exposure their listing will get by working with you.
- Through a relationship with ListHub.net and our KWLS syndicates, listings are automatically sent out to our partner websites, so you avoid makng double entries.

To Do:

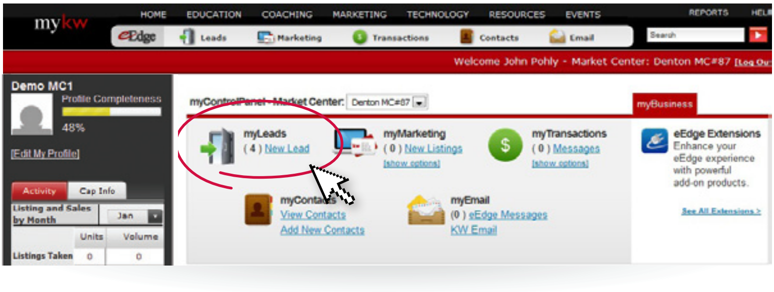
Entering listings into KWLS (note: ask your Market Center Administrator if these steps are necessary before starting)

1. Under the myMarketing tab, click on 'show options.'
2. Click on 'Manage KWLS'.
3. You will enter a new website called KWLS, click on 'Create a Listing'.
4. Enter all fields, then click 'Next'.
5. Select your MLS and enter the MLS number for the listing, then click 'Save'.
6. At this point you can click on 'Submit to MCA'. It will soon be accepted and appear as a featured listing on your websites.

Don't let another lead get away

Be the first to follow-up with ***myLeads***

When an average of 67 percent of consumer leads go unanswered, that means market share and money left on the table – money you could earn. With myLeads, you choose how you want to be notified when a lead comes in from all KW sources and listings syndication partners, ensuring your response time is immediate, meeting your future clients' expectations.



To Do:

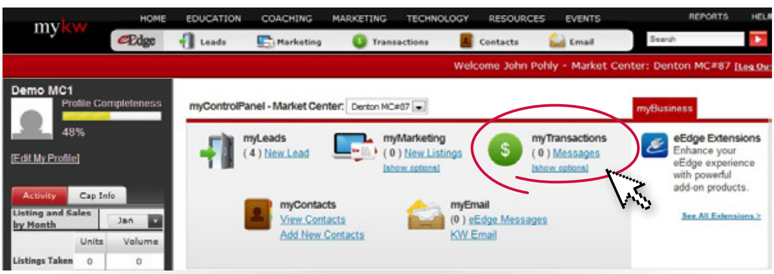
Once a new lead notification pops up:

1. Click 'New Lead' on your myControl Panel to access the myLeads dashboard.
2. Click on the lead's name to initiate contact.
3. Click 'Open the ICW' to launch the Initial Contact Wizard (ICW).
4. If the lead has provided a phone number, the ICW gives you a script and prompts you to make notes on the call outcome.
5. You are then prompted to set a reminder for follow-up.
6. If the lead has provided only an email address, the ICW will prompt you to send an email.
7. Be sure to change the status after you contact the lead. If you do not contact a lead within twelve hours, eEdge will automatically send leads an email. eEdge will not automatically change a lead's status.
8. Leads you contacted are no longer in your myLeads dashboard; they are moved to myContacts.

Complete seamless, electronic transactions

*Get started with **myTransactions***

myTransactions provides an online system that carries you, your client, and any parties you choose to invite, throughout the entire life cycle of the real estate transaction – including electronic signatures and unlimited document storage. Per your permissions, all parties can see the documents they need to see, and none of the ones they shouldn't. Say goodbye to smudged contracts, illegible handwriting, over-faxed and lost documents.



Features:

- Online forms with eSignature.
- Online document management.
- Agent branded client portal.
- Collaborative access for vendors and co-op agents.
- Online document storage.
- Reduced liability and E&O insurance.

To Do:

1. Visit mykw.kw.com/eedge.
2. Click on 'eEdge 101 Training Guide' under 'Learn'.
3. Review Lesson 8 for comprehensive myTransactions instructions.
4. Click on 'Webinars' tab for addition live training opportunities.

✓Track your progress!

- [ ] Is your myControl Panel activated?
- [ ] Are your emails set up?

  eEdge ______________________________

  eAgentC ______________________________
- [ ] Is your myProfile complete?
- [ ] Did you add names to your myContacts?
- [ ] Are your KW websites set up?

  eEdge ______________________________

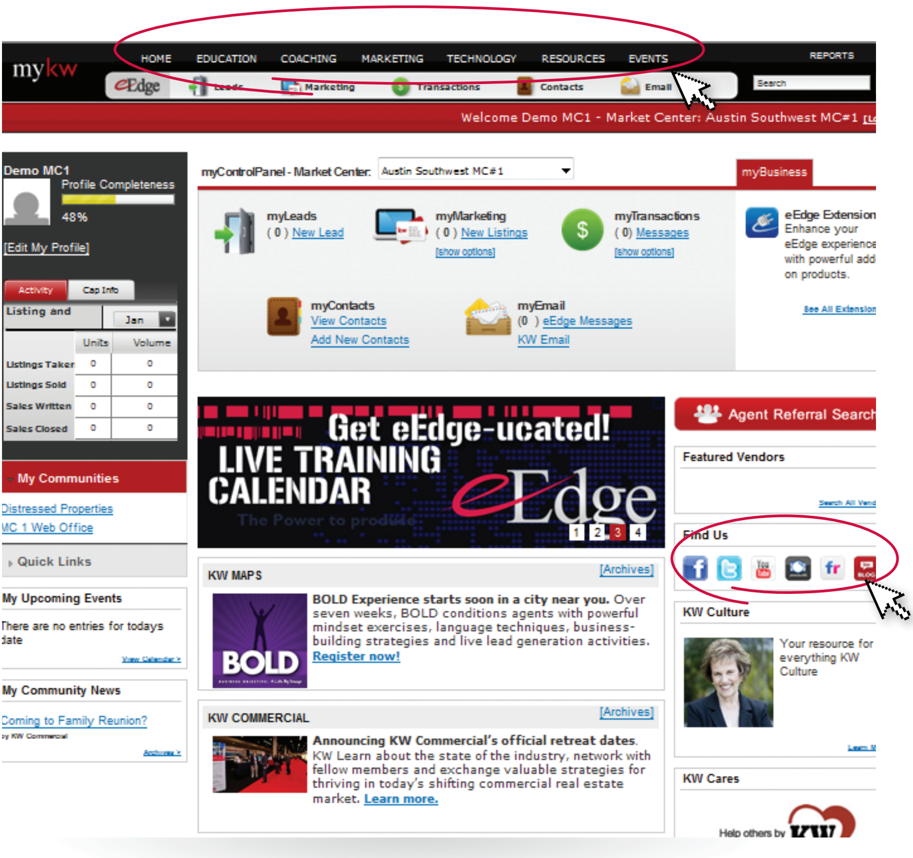
  eAgentC ______________________________
- [ ] Have you kicked off a campaign in myMarketing?
- [ ] Are your listings entered into the KWLS?
- [ ] Are you following up with your leads?
- [ ] Have you gotten started with myTransactions?

✚ Now that your setup is complete, turn the page for more great resources and tools!

Explore mykw.kw.com

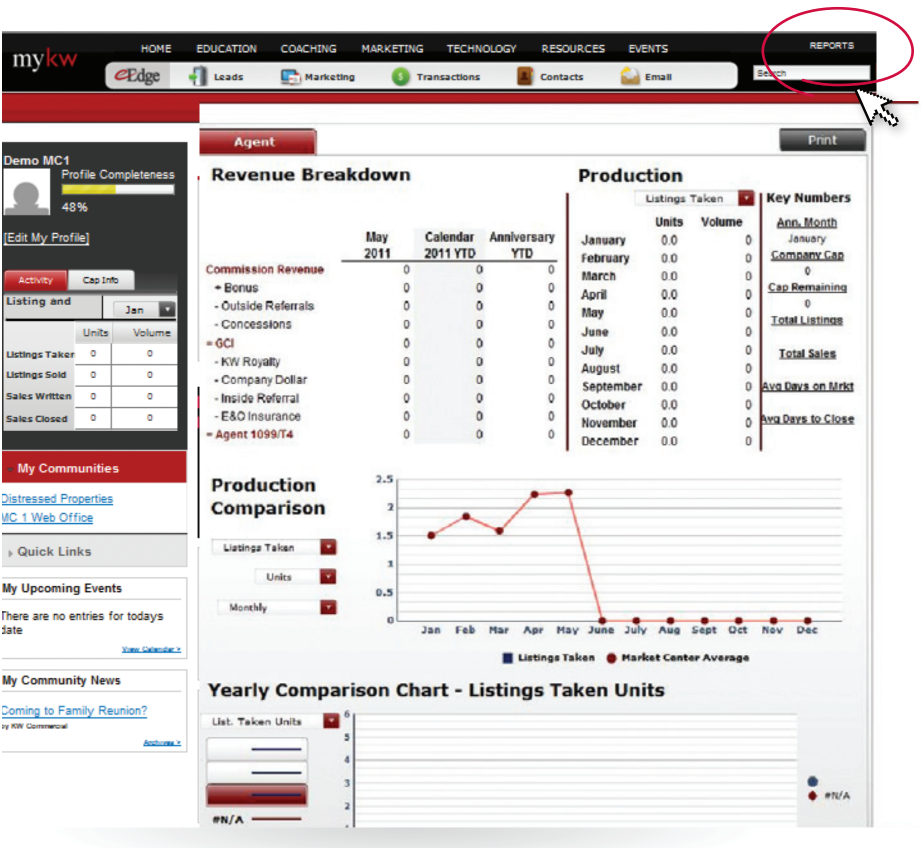
Check out the central hub for KW education, resources and technology

Aside from serving as the location of your myControl panel, mykw.kw.com is also where you will find resources such as free course downloads, training videos, event schedules, press releases, tech support and our public knowledge base. Explore each of the tabs at the very top of the web page and take advantage of all these free resources for bettering your business.



Check out in-depth reports to track your results

Whenever you want a snapshot of your booked business, just login to mykw.kw.com. There will always be a report just below your agent photo. For more in-depth reporting just go to the Reports link in the top right corner. Be sure to check out the Associates link for reports on your production and income. Please note there is a 2-3 week lag time on the numbers reflected in these reports since market center numbers are reported at the end of the month.



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