



ISA Model

Playbook

kw Where Entrepreneurs Thrive

Welcome to the ISA Model Playbook

It's a tale as old as time, true as it can be... as your database grows in number so grows the number of touches and conversations that you will need to have to ensure your conversion rate stays at the level you desire.

The question becomes, how do you make the time to either make first contact or deepen the relationships that you hope to convert into new, repeat, and referral business?

One of the most powerful answers to this question comes in the form of a single word: leverage. Gary Keller says that when we hit a ceiling in life or business we are often missing a relationship. In this case, that missing relationship may be an Inside Sales Agent.

An Inside Sales Agent, also known as an ISA, is someone who has mastery in the practice of selling a product, setting an appointment, or otherwise nurturing a relationship. A well-trained and motivated ISA is one of the most powerful hires that any real estate agent can make as it allows you to make more high value touches often, which is the basis of any database-driven enterprise.

This playbook is designed to help you think through whether or not an ISA is the right hire for you considering where your business is today. It will also help you get the most out of your ISA should you choose to hire one.

What To Consider Before Hiring An Isa

Even the perfect hire made at the wrong time ends in failure. This is why you must ensure you are ready to make this hire in order to best position yourself to succeed.

Whether you are a solo agent or a team owner, there are three questions that you should ask when assessing whether or not you are ready to make your first ISA hire.

3 Questions

**What am I
hiring an
ISA for?**



**Can I make
the upfront
investment?**



**Can I provide
the ISA ongoing
training and
support?**

1. What Am I Hiring An ISA For?

In order to answer this question let's do a quick database analysis:

Example:

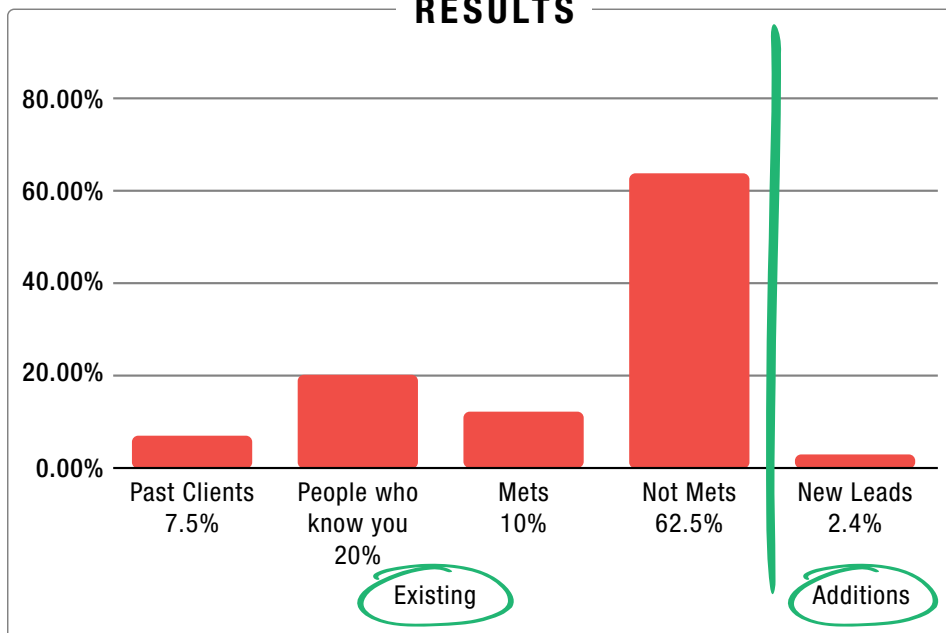
1. How many total people do you have in your database? _____
2. How many of those people are past clients? _____
3. How many of those people know you, like you, and would refer business to you? _____
4. How many of those people are "mets" (you met them but they do not fit into the second or third above category and you now need to deepen those relationships)? _____
5. How many are "not mets" (they do not know you at all; this may be people in farm areas or leads you purchased and did not connect with)? _____
6. How many NEW LEADS not in your database do you produce or purchase per month? _____

2,000
150
400
200
1,250
40/mo

Now divide the total number of people in each category by the total number of people in your database to get a percentage of the total for each category.

$150 / 2000 = \underline{7.5\%}$ $400 / 2000 = \underline{20\%}$ $200 / 2000 = \underline{10\%}$ $1,250 / 2000 = \underline{62.5\%}$ $40 \times 12 = \underline{400/\text{yr}}$

RESULTS



In this example we can clearly see that the opportunity lies in =

1. Converting NOT METS (group four) into METS (group three)
2. Deepening the relationships with those in groups one and two
3. Converting new leads into customers

The key here is that once you know what the biggest opportunities are, you can work on finding the person with the right personality who will use the right systems with the right conversations to get you the INCREASE in sales that you desire!

2. Can I Make the Upfront Investment?

Whether you are a company of one or a company of many, when you hire your first ISA you are effectively creating a new sales division within your business. We need to make sure that you are appropriately capitalized to do so because you do not want a new investment in your business to put pressure on your personal money. Depending on the type of person that your ISA will be contacting, you may have data costs for lists, technology costs depending on what you use to contact people, compensation costs, and office rent. All of these play a role in determining your monthly cash-burn rate on this investment.

1. Data/Leads \$_____

Will there be a cost to acquiring the data that you will need in order for your new ISA to make their contacts? One example of this may be a one-time purchase of names, addresses, emails, or phone numbers from a third-party data provider. This is often used if you intend to have your ISA contact a farm area on your behalf. Another example might be an internet “ad spend” that is used to generate NEW LEADS into your database.

2. Form of Contacts/Technology Stack \$_____

Will there be a cost for whatever tool your ISA will use to make their contacts? Examples of this may be phone and internet expenses, dialers, texting platforms, and CRMs. This is where using KW Command can help you save money.

3. ISA Compensation \$_____

We will discuss this in detail in the case studies below as there are a few different ways to compensate an ISA.

4. In-Office or Remote \$_____

Will you have a rental expense for the location that your ISA will be making contacts from?

$1 + 2 + 3 + 4 = \text{Total Cash Burn/month for an ISA division.}$

So, now take your Total Cash Burn x 3-6 months = \$_____.

A good rule of thumb is to have 3-6 months in reserves.

You don't just want to cover our burn rate, you want to earn an acceptable rate of return. However, in order to earn a good ROI, you must have the staying power to allow the system to work. We will touch on Return on Investment (ROI) deeper in the next section.

3. Can I Provide Ongoing Training and Support?

When you bring people into our lives and businesses you have a responsibility to provide those people with both servant leadership and care. In order for your ISA to become the best versions of themselves they will need to be onboarded, trained, coached, and lead, which will take both time and resources. The question of whether you can provide ongoing support is best answered after you read the rest of this playbook! If at the end of this playbook you've decided that you cannot provide the support your ISA needs, you can explore the options of hiring a manager or a third-party to support the operations of hiring and maintaining an ISA.

ISA Model

1 Get Ready To Hire

1. Determine job requirements
2. Determine compensation structure
3. Create a job description

2 Make The Right Hire

1. Advertise the job
2. Interview process

3 Thrive Through Training And Coaching

1. 30/60/90 and expectations
2. Daily and weekly coaching
3. Accountability
4. Training best practices

4 Track What Matters

1. What metrics are being reported on/tracked
2. Best practices for how to report/track

5 Prep for Success

1. Agent and ISA relationship
2. Lead policies
3. ISA structure

6 Inspect What You Expect

1. Evaluate what is and isn't working

1 Get Ready To Hire

Jim Collins says, “it is always first WHO then WHAT.” We have learned that the business owners who have the most consistent success when making hires do so by following a system. Career Visioning (CV) and The Leverage Series are classes KWU teaches to thoroughly explain how to use our proprietary system to make hires. We deeply urge you to take these classes prior to making any hires! That said, the following section will walk you through the decisions that you need to make, when hiring an ISA.

1. Determine Job Requirements

**The first two
decisions that you
will need to make**

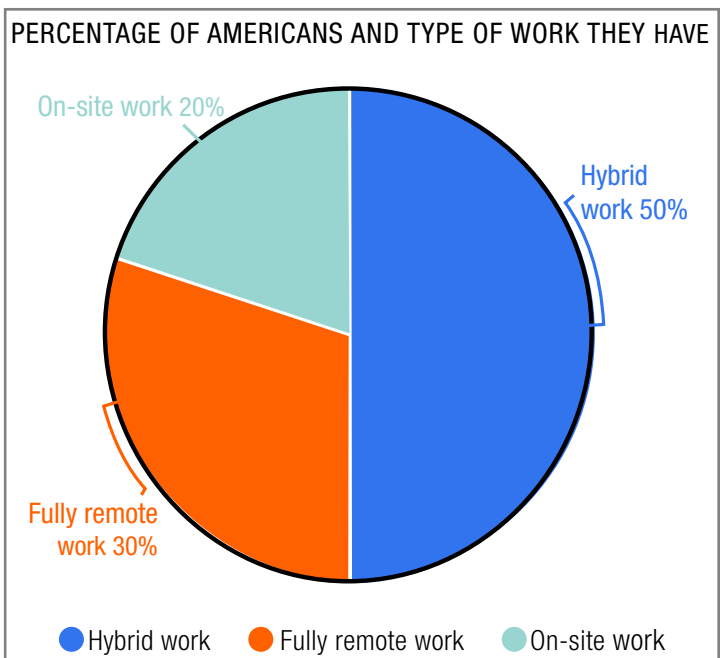


1. Do you want your ISA to be in-office or remote?
2. Do you want to employ a licensed or unlicensed ISA?

Decision #1: In-Office or Remote

One of the first decisions that you need to make when determining job requirements is whether to hire an in-office or remote ISA. Keep in mind that during COVID most of the world “worked remotely” and this has had an impact on how jobs are completed. Depending on what you choose, your hiring pool may be limited or expanded.

In February 2023, Zippia, a career search website, compiled information from 10 different polling and news companies focusing on both employers and employees. They surveyed how people felt about in-office and remote working. It was reported that 68 percent of Americans prefer remote work as opposed to in-person, and 68 percent of employers say employees should be in the office at least three days a week to maintain company culture. Since you are likely the employer in this situation, it is important that you look at this issue from both perspectives and consider that the best answer for you and your employee may be a hybrid model. The illustration here shows that there are really three options: in-office, fully remote, and hybrid.



<https://www.zippia.com/advice/return-to-work-statistics/>

As with all decisions, there are pros and cons. We will explore both in the charts below:

In-Office

PROS	CONS
Culture and connection	Expense of office equipment
Hands-on approach to learning	If you are not there they are alone
Increased teamwork	Expense of office rent
Improved on-boarding	
May increase productivity	
Allows for better quality control + risk mitigation	
May allow for a smoother “hand offs of clients”	

Remote

PROS	CONS
Can be hired for less money	Inability to train hands-on
Flexibility in work hours	Harder to communicate
Can be considered a massive job benefit making the employee happier in their job	Culture may suffer
	No physical separation between work/home
	Can lead to the employee feeling isolated
	If out of your country of origin

Hybrid

PROS	CONS
May provide better work life balance	Only works if the person is local
Seems to be desired by employees	
Can be considered a massive job benefit	
Gives time for connection and space	

Remember that making this hire is about YOUR needs. Ask yourself, “what would work best for me? Do I like being with my employee(s) or do I just want the result without sharing physical space?” Remote employees, both onshore and offshore, have come a LONG way over the last three years. Researching companies like Cyberbacker or VibeConnections is a great place to start.

Decision #2: Licensed or Unlicensed

When deciding between hiring licensed or unlicensed ISAs, the largest consideration is often around the legality of what they can and cannot say within your state and how that will affect their ability to speak to potential or current clients on your behalf. ISAs that have their real estate license are able to have more in-depth conversations with buyers and sellers. *(Legal implications will vary by state and brokers-in-charge should be consulted before making a decision).* Ultimately, deciding between licensed and unlicensed ISAs comes down to what the ISA will be doing and the conversations they will be having. For example, if your ISA is going to be calling through your database doing client care calls, they may not need to be licensed. Conversely, if they are going to be discussing the value of potential sellers' homes or giving an opinion to a potential buyer about the area they should consider and specific homes within it, they may need a license.

In step #2, Make The Right Hire, will review creating the Job Description for this position and provide you the opportunity to determine more job requirements.

2. Determine Compensation Structure

Now that you have determined you are ready to make this hire, where the opportunity lies in your business, where the ISA will work, and if they need a license, you need to make a decision about how you want to compensate them.

Here are the three most common options for compensation structures:

Option A: Base salary + percent of Gross Commission Income (GCI)

Option B: Percent of GCI only

Option C: Salary

Option A: Base salary + percent of GCI

This is the most popular option among the agents and teams we interviewed. They believe it provides the most balance between some reliable income and bonuses that reward the behavior that the employer wishes to encourage (CLOSINGS!). These bonuses can be referred to as anything that encourages activity, i.e. Success Fee Bonuses. In this option, the ISA makes a small monthly base salary and a percentage of GCI when a transaction closes that they participated in. We found this is typically a \$2,000-\$3,000/month salary and 5-10 percent of GCI. This option compensated as both a W2 or a 1099 compensation structure.

Option B: Percent of GCI only

In this option, the ISA is only compensated by earning a success fee bonus when a property closes where they helped procure the transaction. Often on a per-closing basis, this will equate to a larger percentage of GCI paid than if there was also a salary component. In essence, you are asking the ISA to accept less reliability in their income by providing them the opportunity to make larger sums of money per deal that closes. Employment of this type is often compensated on a 1099, or contractor, basis. We found examples ranging from 10-17% of GCI if the success fee bonus is their sole source of income.

Option C: Salary

In this option, the ISA is compensated with a salary and perhaps additional employee benefits like health care and/or 401K. They do not get a success fee bonus on closed transactions and have complete income reliability, receive a W2, and can be directed as a full-time employee. This will allow you more control over the employee and their activities and may appeal to a different caliber of talent. We found examples of 100% salaried ISA's earning \$48,000-\$100,000.

While the above are three common compensation structures, you can get creative based on the job requirements. *Example:* In states that do not allow you to pay commissions to an unlicensed person, you can restructure to pay them bonuses off of the number of transactions closed, listings taken, appointments set, etc.

Review the following case studies on the next page for each of the above options to help you understand your Return on Investment (ROI) when hiring an ISA.

First, let's remember the equation for ROI:

$$\text{ROI} = (\text{Gain from Investment} - \text{Cost of Investment}) / \text{Cost of Investment}$$

$$\text{ROI} = (\text{Gain from Investment} - \text{Cost of Investment}) / \text{Cost of Investment}$$

Case Study #1: Base Salary + Percent of GCI (Success Fee Bonus)

This is an ISA that has a base salary of \$2,500 per month coupled with a success fee bonus of 5 percent of the closed GCI. This month they had five closings.

Assumptions:

\$350,000 average price point
@ 2.5% commission
\$2,500 base pay + 5% of GCI
5 ISA closings/1 month

$$\begin{aligned} \$350,000 \times .025 &= \$8,750 \text{ commission} \\ (\$8,750 \times .05) &= \$437.50 \text{ 5\% to ISA} \\ \$8,750 \times 5 \text{ closings} &= \$43,750 \text{ commission to team} \\ (\$437.50 \times 5) \text{ } \$2,187.50 + \$2,500 \text{ base} &= \$4,687.50 \text{ total to ISA} \\ \$43,750 - \$4,687.50 &= \$39,062.50 \text{ remaining to team} \end{aligned}$$

$$(\$43,750 - \$4,687.50) / \$4,687.50 = 833\% \text{ ROI}$$

Case Study #2: % of GCI only

This is for an ISA that receives 10 percent of the commission on deals that they procured. They do not receive a salary. This month they had five closings.

Assumptions:

\$350,000 average price point
@ 2.5% commission
10% of GCI
5 ISA closings/1 month

$$\begin{aligned} \$350,000 \times .025 &= \$8,750 \text{ commission} \\ (\$8,750 \times .10) &= \$875.00 \text{ 10\% to ISA} \\ (\$8,750 - \$875) \times 5 \text{ closings} &= \$39,375 \text{ commission to team} \\ \$875 \times 5 &= \$4,375 \text{ to ISA} \\ \$39,375 - \$4,375 &= \$35,000 \text{ remaining to team} \end{aligned}$$

$$(\$39,375 - \$4,375) / \$4,375 = 800\% \text{ ROI}$$

Case Study #3: Salary

This is an ISA that receives a \$4,000 monthly salary as their compensation. They do not receive bonuses. This month they had five closings.

Assumptions:

\$350,000 average price point
@ 2.5% commission
\$4,000/mo salary
5 ISA closings/1 month

$$\begin{aligned} \$350,000 \times .025 &= \$8,750 \text{ commission} \\ \$4,000/\text{mo} &= \$4,000 \text{ to ISA per/mo} \\ (\$8,750 - \$4,000) \times 5 \text{ closings} &= \$23,750 \text{ commission to team} \\ \$4,000 \times 1/\text{mo} &= \$4,000 \text{ to ISA} \\ \$23,750 - \$4,000 &= \$19,750 \text{ remaining to team} \end{aligned}$$

$$(\$23,750 - \$4,000) / \$4,000 = 494\% \text{ ROI}$$

PRO TIP: It could take a year before your ISA is accounting for five closings a month as shown in the examples above. Do your math based on your conversion rates, sales prices, commission rates, and lead type. Find the number of closings that you need to break even and then the number of closings that you need to reach your ROI goals. Ask yourself if these numbers are realistic and if you want to focus your time and resources there?

3. Create Job Description

A job description may contain the following components: job title, job purpose, job duties and responsibilities, required qualifications, preferred qualifications, working conditions, and compensation. One of the most important questions that you should ask yourself before creating a job description is: what are the three things that if this employee DOES NOT accomplish will cost them their job?

Some of the most popular answers to this question for an ISA are:

1. Make _____ number of contacts or nurtures or appointments or connections each day/week/month.
2. Participate in role play/real play _____ times each day/week/month.
3. Hand off at least _____ appointments or warm connections per day/week/month.

In the spaces below, write the three things that you absolutely NEED to have completed by your new ISA:

1. _____
2. _____
3. _____

These three things will help inform the job description that you write. Keep these three things in front of you as you write the full job description and make sure that these are the focus of the document.

PRO TIP: The best job descriptions are not a list of everything that someone MAY do rather, it focuses on the KEY things that they MUST do.

When writing each component of the job description be brief, clear, and focus on the key points. We've explained each component below.

Job Title - While the job duties will be that of an ISA, you may want to use a different title for the role. If you choose to use a different title, it should still describe the position. Examples would be "Inside Sales Professional" or "Client Care Coordinator" if your ISA is primarily calling your database. Many people will look at a job title and make a snap judgment so take your time and make sure your title is the right one! It is possible that the perfect applicant may not even know what an ISA is!

Job Purpose - This section should be three to four sentences and should clearly state a high-level overview of the position.

Job Duties and Responsibilities - This section lays out the functions and tasks of the position that you are hiring for. You should list any daily or weekly tasks, lead type being contacted, expected outcomes, and anything that could help a potential employee visualize a typical day. Be short, clear, and use the exercise on the previous page to help fill in this section.

Required Qualifications - These are things that are required for the position: skills, education level, and previous experience. In contrast, Preferred Qualifications are "nice to haves".

Working Conditions - This is where you would detail whether the position is in-office or remote, any physical demands, or atypical expectations.

Compensation - This is what every applicant is looking for! Clearly list the compensation and any benefits. As a role that is likely going to be different than just a salary, it's important to be clear on both the expected and potential income.

PRO TIP: Write in a concise and direct manner and keep the job description simple and attractive.

Job description

The mission of the Miale Team @ Keller Williams is to Empower People - The People We Serve & The People We Serve With. We are committed to providing a premier customer service experience for our clients.

Knowledge we've gained through years of working in the local market empowers us to provide our home buyers and sellers with the advice they need to make informed decisions. Whether it's selling a home, searching for a home, or negotiating a contract, each member of the Miale Team is an experienced real estate professional who applies their expert skills to each step of the process to help our clients achieve an outstanding results.

Who We Are Looking For:

The Inside Sales Agent draws energy from working with people and works with a sense of urgency. This enthusiastic, self-starting person with a passion for selling is responsible for converting a massive amount of leads into appointments through personalized follow-up.

The individual will take ownership of leads and actively systematize the conversion process for maximum effectiveness. They record their productivity and sales metrics and track the results in regular accountability systems and meetings. This person has the organizational and time management skills necessary to handle the constant flow of leads coming in and the subsequent documentation, assignment, and follow-up of those leads.

This individual must be highly trustworthy—in addition to being the first point of contact to the team, they will also have access to sensitive files and information regarding associates, customers, and finances.

The Inbound Sales Agent's activities directly affect the bottom line, and as such they are deeply committed to the team achieving our goals as

V 1-2022

Elevate Realty Group, Inc.
Inside Sales Partner**Expectations/Plan**

This position is the first interaction with customers or potential customers for Elevate Realty Group and is one of the most important positions. Knowing Elevate's track record, value propositions and what unique programs we offer are paramount. This position touches every customer we come into contact with and sets up their expectations for the type of company we are. Following diligent systems to stay in contact with customers is extremely important.

Job Description

- 1) Call team leads daily and qualify per team qualification standards.
- 2) Follow lead follow up standards and database management standards.
- 3) Dial a minimum of 500 outbound calls per day/build relationships with prospects.
- 4) Make 40 contacts per day on average in a 5 day work week.
- 5) Call Cold prospects around homes listed/pending/sold.
- 6) Practice scripts/dialogues daily.
- 7) Learn and use CRM within protocols of team standards.
- 8) Set Listing and buyer appointments for agents.
- 9) Follow up with agents on all appointments set.
- 10) Follow up with Seller Leads.
- 11) Audit CRM weekly for all seats to ensure lead protocols are followed.
- 12) Assist VA's with target market phone numbers.
- 13) Provide weekly review and training with agents on pass off.
- 14) Consistently look for ways to improve lead conversion, generation, and efficiency.
- 15) Clear and manage all seller lead tasks.
- 16) Manage Seller Lead Pipeline categories
- 17) Check in daily with Steve LaMothe on top prospects.
- 18) Set 20+ appointments per month.
- 19) Create and maintain lead follow up and nurture plans/content consistently.
- 20) Respond to leads within 5 minutes.
- 21) Create and maintain automated follow up plans based on relevant messaging.
- 22) Manage past client databases with accurate contact information and manage consistent communication.

Remote Positions

If you are a remote inside sales candidate the following expectations will be followed. Inside sales partner agrees to clock in and out and lunches consistently at the same time as agreed upon with management. Zoom meeting check-ins will be held with Elevate Realty Group management and the following standards will be met.

- Daily zoom meeting huddle for role playing at 9am.
- All calls will be reported and tracked consistently.
- All lunches and breaks will be logged in hour tracking software. • All team meetings will be attended virtually.

Job Description *example 3*:

Job Description:

Are you a rockstar Inside Sales Agent with a passion for real estate? Do you thrive in a fast-paced environment and enjoy the thrill of closing deals? If so, we have the perfect opportunity for you!

We are seeking a highly motivated and results-driven Inside Sales Agent to join our dynamic team at our fast-paced real estate firm. As an Inside Sales Agent, you will be the driving force behind our lead generation efforts and will be responsible for turning **potential clients into qualified appointments for our sales team.**

Responsibilities:

- Receive inbound leads in order to schedule appointments for our lead agents
- Cold call and prospect potential clients to generate leads
- Follow up with existing leads via phone, email, and other communication channels
- Qualify leads to determine their needs and interests
- Schedule appointments for our sales team to meet with qualified leads
- Update and maintain our customer relationship management (CRM) system

Requirements:

- An active real estate license or have already passed the school/state exams
- Excellent communication and interpersonal skills
- Strong sales skills and the ability to close deals
- A proven track record of achieving sales targets
- Ability to work in a fast-paced environment and multitask effectively
- Familiarity with real estate sales is a plus but not required

Compensation:

This is a full-time position with a base salary plus a generous bonus structure based on performance. The total compensation package is expected to range between \$60,000 and \$80,000 in the first year with many inside sales agents making over \$100,000 in year two and beyond.

If you are a driven and ambitious sales professional who is passionate about real estate, we want to hear from you! Please submit your resume and cover letter for consideration.

Job Type: Full-time

Salary: \$60,000.00 - \$80,000.00 per year

Benefits:

- Paid time off
- Paid training

Experience level:

- 1 year

Shift:

- 8 hour shift

Supplemental pay types:

- Bonus pay
- Commission pay

Base Salary PLUS Comissions

Only two spots open! Looking for Rockstars only! Salary PLUS Bounuses

Want to make a lot of money and work with talented people? Love helping people find the home of their dreams? So do we! We are looking for motivated real estate inside sales agents who are passionate about helping as many people as possible buy or sell a home.

This is your opportunity to join a dynamic and hyper-successful team where you can grow your career, earn a significant financial income and help your customers achieve their ultimate goal of a new home. Base salary plus performance bonuses

Responsibilities:

- Reach out to inbound potential buyer and seller clients
- Reaching out to warm leads
- Follow up with potential clients
- Setting appointments with potential clients
- Generate new leads to promote new business

Requirements:

- Currently hold an active real estate license in the state of Arizona
- At least 1 year of sales experience
- High school diploma required, bachelor's degree preferred
- Excellent interpersonal and communication skills
- Valid U.S. driver's license with the ability to travel by car

Job Type: Full-time

Salary: \$75,000.00 - \$167,600.00 per year

Experience level:

- 1 year

Supplemental pay types:

- Bonus pay
- Commission pay
- Performance bonus

Weekly day range:

- Monday to Friday

Work setting:

- In-person
- Office

Ability to commute/relocate:

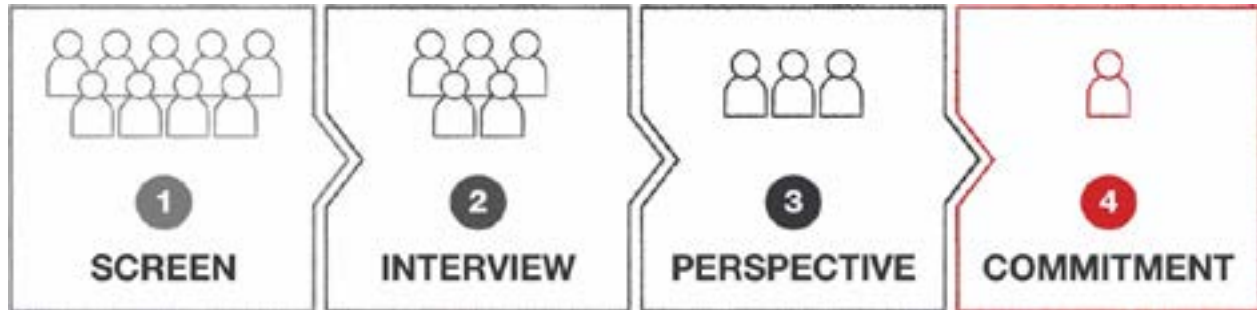
- Mesa, AZ 85206: Reliably commute or planning to relocate before starting work (Required)

2

Make The Right Hire

Now that you have your job description together it is time to start the process of making this hire. The **Keller Williams Career Visioning (CV)** course takes you through the processes of screening, interviewing, and making offers to your candidates.

CV focuses on four steps: Screen, Interview, Perspective, and Commitment.



However, before you can follow these steps you must first source some candidates!

1. Source Candidates

Sourcing candidates may seem like the simplest part of the hiring process, yet it's the most important. Advertising the position effectively ensures that you are receiving qualified candidates.

The first step is identifying where you want to advertise the position. The primary approach to sourcing candidates is to use your network and start small. You will be talking to vendors, clients, and people in your Market Center for candidate referrals. This might mean that you get less candidates over a longer period of time, but they may be more qualified and have references you trust.

The secondary approach includes posting on job sites and social media. This approach may lead you to getting a lot of candidates, so you will need to dedicate more time in order to review them.

Primary Approach	Secondary Approach
Vendors	Job Posting Websites (ZipRecruiter, Indeed)
Past Clients	Community Bulletin Board (Craigslist)
Sphere	Social Media (Facebook or Instagram)
Market Center	LinkedIn
Industry-specific Platforms	

Wherever you decide to source candidates, it's important to choose something that aligns with the amount of time you have to dedicate to reviewing candidates.

2. Interview Process

Screening candidates is the first step to the CV process. Getting specific about qualities or experiences you are looking for will help you quickly narrow down candidates. The following list of qualities and/or experience was developed after interviewing with top agents that have between one and thirty ISAs:

Qualities	Experience
Ability to multitask	Military or college recruiter
Ability to listen thoroughly	Headhunter
Empathy	Customer service representative
Willing to learn and grow	Sales
A problem solver	Restaurant server
Not easily discouraged	

While the above list is not comprehensive of all of the qualities or experience you might look for, it can help you build your “ideal ISA avatar.”

Ideally, you are looking for someone with the following attributes:

1. They love speaking with people and get energy from doing so.
2. They have a mastery, or will commit to obtaining a mastery, of using the words that move people into action faster with them than without them.
3. They understand the difference between “chatting” and “closing.”

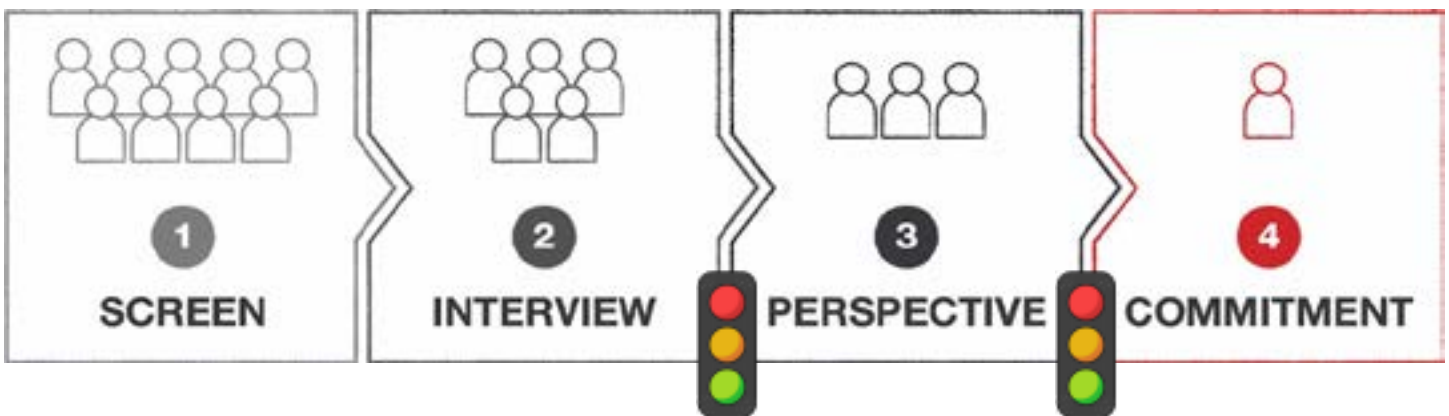
Keep this in mind everytime that you communicate with them during the hiring process. Be mindful of how they sound on a voicemail, how they come across via email or text, and how they speak during your discussions. Are they well spoken? Do they sound confident in their answers to your questions? Do they admit when they do not know an answer or did they just make something up? Every second you communicate with them should help you decide if they are the right person for you.

PRO TIP: The ISA position is not an entry-level position where the goal is to advance out of it to a new position; it's a destination position that allows people that have the right personal traits, work velocity, and motivation to live their best life which includes great financial benefits.

Now that you know what you are looking for, continue the **interview** process by selecting candidates to move through the Career Visioning process. You're going to start by sending them the KPA. *The KPA is an enhanced behavioral assessment that measures personality traits and cognitive thinking abilities.*

Once they have completed the KPA, the next part of the process takes you and the candidate through their life story and motivation. The goal is to uncover how the candidate has responded to experiences in their life and what motivates them to live their life to its fullest potential.

At this point you have narrowed down the candidates to the one or two that you are considering hiring. Before you make the offer, it's important to gain **perspective** by checking their references and gathering opinions from others. Ask people on your team or in your Market Center for their opinion. You're hoping that they see what you see in the candidate. Now you are ready to make a **commitment**, make the candidate an offer!



After you complete each phase you must STOP and play red light, green light. As you go you will learn things about your candidate, and as soon as you discover they are not the best fit FOR YOU respectfully eject from the process and move onto the next candidate. Do not let the natural momentum of the process pull you into a bad hire; the cost of a bad hire is far too great to make this mistake!

PRO TIP: Have the candidates complete a DISC assessment to help you understand how the individual ranks in the four primary personality types – **d**ominance, **i**nfluence, **s**teadiness, and **c**onscientiousness.

Career Visioning Checklist

		GOAL	TIMING
SCREEN	☐ Filter	Check the candidate's résumé against the job profile	10 mins
	☐ Establish Track Record ✓ Resume Review Form ✓ Track Record Questions ✓ KPA Job Fit Report	Find out if the candidate meets the minimum requirements to get the job done, and see if you like them	60 mins
	Meeting ONE ☐ Verification ✓ Job Fit Verification	Get to know the candidate at a deep level to make sure their personality profile matches the role	60 mins
INTERVIEW	☐ Thought Process ✓ 30 Questions	Ask the candidate questions to understand how their mind works	60 mins
	break between interviews to process information		1-2 days
	Meeting TWO ☐ Life Story ✓ Flipchart/colored markers ✓ Life Story Questions	Go beyond what the candidate has done to uncover why and how they did it, and what they learned from these experiences	60 mins
PERSPECTIVE	☐ Motivation ✓ Flipchart/colored markers ✓ Motivational Questions	Uncover the candidate's core culture and how they think about their future in key dimensions of their life	60 mins
	☐ Group	Discover if your team and the candidate gel	60 mins
	☐ References ✓ Candidate Reference List ✓ Reference Script	Confirm with others that the candidate is who they say they are, and predict future achievement from past performance	3-5 business days
COMMITMENT	☐ Defense ✓ Job Profile and Résumé ✓ Screening Notes ✓ KPA Job Fit Report ✓ Notes ○ Verification and Thought Process ○ Life Story and Motivational ○ Group and Reference	Make an impartial decision by drawing on collective wisdom	60-90 mins
	☐ Offer ✓ Expectations Dialogue ✓ Offer	An empowered new candidate set up for success	60 mins

Find all Career Visioning resources on KW Connect including tips on conducting the CV process virtually! <https://www.kwconnect.com/page/leverage-resources>

3

Thrive Through Training and Coaching

Once you have made the hire, you are now morally obligated and financially incentivized to properly onboard, train, and coach them so that they achieve at their highest level possible.

The time you invest into training and coaching your ISA will directly correlate to their increased production and your increase in profit. Henry Ford said it best: *"The only thing worse than training your employees and having them leave is not training them and having them stay."*

A good onboarding and training program is:

- ✓ 1. Clearly structured and outlined
- ✓ 2. Provides clear expectations for success
- ✓ 3. Is models and systems based
- ✓ 4. Lays a solid foundation for the skills that must be mastered over time

When we TRAIN people in a sales organization we do two things:

1. Move people past fear - When people are afraid they tend to move slower and have less confidence in their abilities to execute the activities that need to be accomplished. For an ISA, we want to remove ALL fear around making contacts and experiencing "rejection".
2. Tell them exactly what to do - Once fear is removed we then need to train people to run the exact models and systems they need to implement in order to be successful.

When we COACH people we do two things:

1. Keep them on track with actions they need to be doing at the times they need to be doing them - This is accountability pure and simple.
2. Help them think through challenges - Once they are doing the activities in a timely fashion we then help them think through any roadblocks and help solve the problems they are facing.

1. 30-60-90

This stands for the first 30, 60, and 90 days of their employment. The primary reason that we use a 30-60-90 is so we have a plan and a document that communicates it. This allows both the employer and employee to know exactly what must be accomplished within these timelines. We begin with the foundational training that creates a base level to hold ISAs accountable and can be easily inspected (this will be discussed later in the playbook). Building your 30-60-90 around this idea will set your ISA up for long-term success.

30/60/90 DAY PLAN

Inside Sales Agent

When developing your new team member's 30-60-90-Day plan, focus on what the goal is, and how you will measure the team member's achievements. Identify targets for the team member that will facilitate success in the role, and on your team. Feel free to consult the job description and KW Connect tools for ideas. Focus on SMART Goals:

- ✓ **Specific:** Clearly define what you are going to do.
- ✓ **Measureable:** Establish concrete criteria for measuring progress toward the attainment of each goal you set.
- ✓ **Achievable:** Goals should be challenging but a match to the knowledge and skills of the employee.
- ✓ **Repeatable:** The action or goal can be completed on a repeated basis.
- ✓ **Timely:** A commitment to a deadline helps a team focus their efforts on urgent tasks first.

30 Day Goals

- Memorize and effectively communicate conversations and the value proposition of working with _____
- Effectively handle objections
- Learn and effectively use the database
- ***Attend weekly accountability meetings
- ***Report metrics daily
- ***# of leads / appointments (This is a standard that you must determine for your team)

60 Day Goals

- Shadow agent(s) on __#__ buyer presentations and listing appointments
- Effectively communicate the life cycle of a lead
- Successfully pass of __#__ of appointments

90 Day Goals

- Have added __#__ of nurtures to the sales pipeline
- ***Successfully complete follow up tasks daily
- Identify efficiencies in processes

***Ongoing Goal. Weekly accountability is key.

Team Member Name:	
Leader Name:	
30 Day Goals Completed:	
60 Day Goals Completed :	
90 Day Goals Completed :	

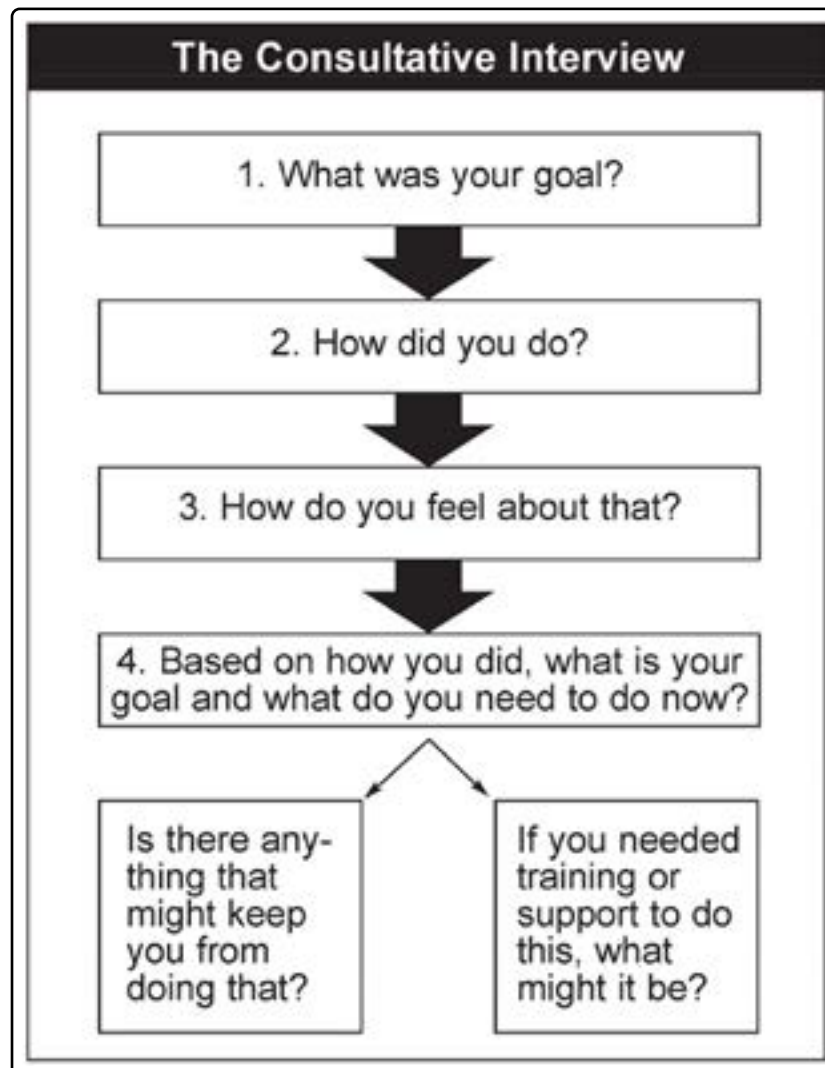
2. Daily Conversation Practice

ISAs should commit to self-mastery, which includes role modeling (they watch YOU do it), role playing (you and the ISA do it together), and real playing (THEY do it and YOU watch) all of the conversation frameworks that they will use on a daily basis. This is non-negotiable and no matter how long they are employed as an ISA, practicing never goes away. Not only does this help them be the best they can be, it instills confidence and trust in themselves and their manager and/or team.

PRO TIP: Practice like you play! If your ISA wears a headset when they are working then they should wear a headset during the conversation training. We practice exactly like we play so that we are ready for game time!

3. Accountability

You are not only holding your ISA accountable to their goals, but to their commitments to you. This may include when they agreed to be in the office, staying in culture, and having integrity in their work. Your accountability can show up as daily check-ins, weekly meetings, or another cadence that works best for you and your ISA. Use The Consultative Framework to guide your accountability meetings.

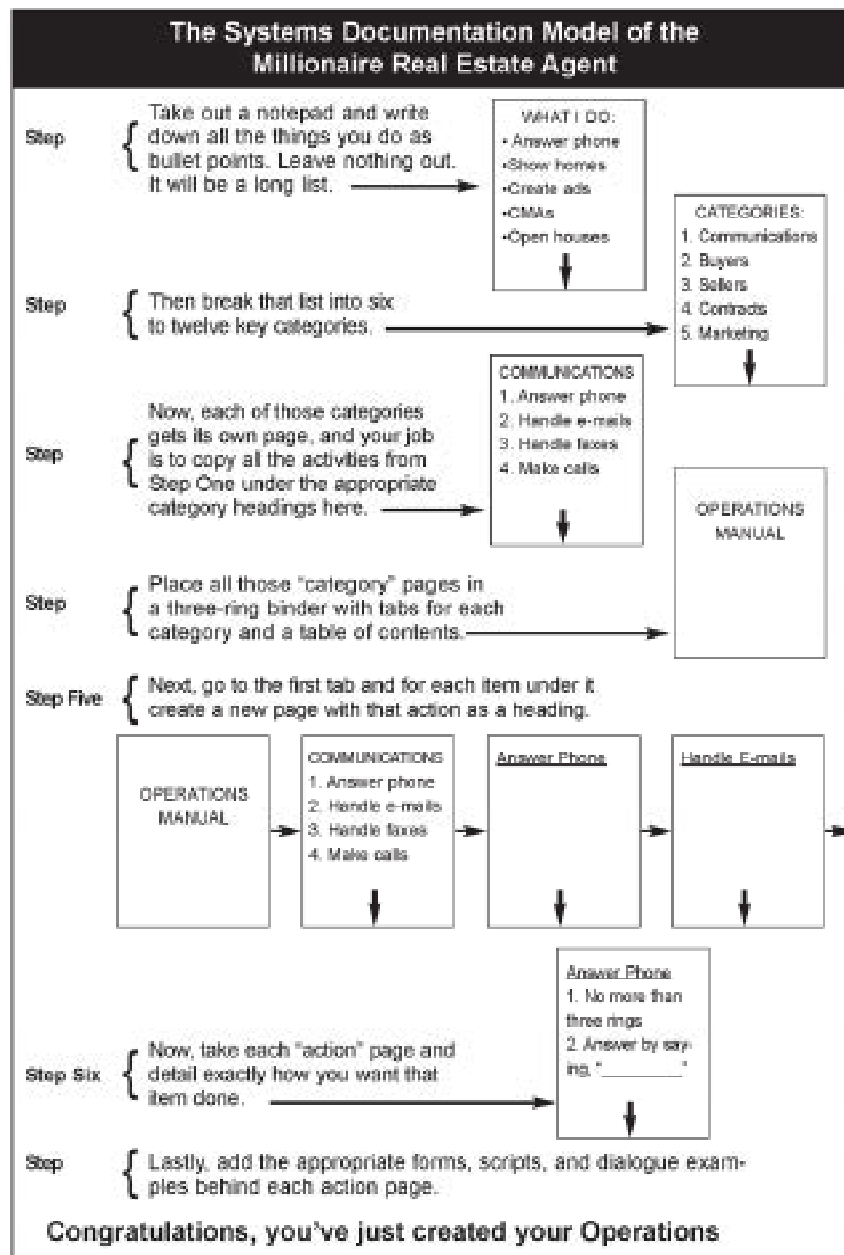


4. Systems, Processes, and Tools

Documented systems and processes can be intimidating, especially if you are a single agent. Chances are you haven't documented anything because, well, it's only you doing the work! If you're a team that has followed the MREA (Millionaire Real Estate Agent), you've already created your Operations Manual, but now need to adjust or add to it for an ISA. Whether you're starting from scratch or updating existing systems and processes, the Systems Documentation Model from the MREA walks you through how to create your Operations Manual step-by-step!

Setting your ISA up to do their job effectively and efficiently doesn't stop at just systems and processes; it's also providing the right tools for them. Tools can be anything from technology, like a CRM, to the headset they need to easily breeze through calls. Training them on how to use the technology provided will help them perform at the highest level.

Below is an image showing the Systems Documentation Model from the MREA to guide you through creating your own.



5. Training and Coaching Best Practices

1. Daily conversation practice

Practicing conversations daily will continue to sharpen your ISA's skill set and help them build confidence. Knowing what to say, when to say it, and how to say it is the ~~ONE THING~~ that by doing so makes everything else easier or less important for an ISA who is making their contacts at a high level. Role playing is one of the best ways to prepare your ISA for the conversations they will have and objections they will face. The first step is to role play a certain topic or conversation and then they go out and have that conversation with a real person. Afterwards, review ahas and continue to make improvements!

2. Shadowing agents

This is taking your ISA with you on appointments and/or allowing them to sit in on your phone calls with customers. Shadowing an agent provides an ISA a different perspective of how real estate agents and their customers have conversations and what is important to buyers, sellers, and real estate agents.

3. Review buyer and listing presentations

Your ISA is the heart of your sales organization, which means they should have a mastery understanding of your customer promises, systems, and value propositions. While your ISAs may never do a buyer or listing presentation, having them trained on how to present them allows them to speak to the process when they have someone ready to meet with an agent.

4. Get in there with them

Work alongside your ISA! Whether your ISA is sitting next to you or a full team of agents, proximity matters. Not only does it improve well-being by simply having company, it will improve productivity and skill in your ISA. A former faculty member from Northwestern University performed a study on how the location of employees in the workplace impacts their performance. He said, *"The beautiful part of it is that when we put these people together, they're not going to materially suffer on the area of strength... they're only going to improve on their area of weakness."* Your ISA will listen to the conversations happening around them and pick up on tone, verbiage, and responses that will only make them better.

5. Define the words that matter

By defining the words that matter most we ensure that everyone understands their meaning and there are less misunderstandings. Imagine the excitement of your ISA when they jump up and scream “I just set a great appointment for you!” You may immediately think: what makes it so “great” and what even is an “appointment”? The agents and teams had the most success when their ISAs and the teams agreed on what most commonly used words mean. One team explained that an “appointment” is set when the ISA has locked in a date, time, and location for real estate agent to meet with the customer and in the Google meeting calendar invite answers the following questions:

1. Customer Name
2. Buyer or Seller
3. Are they working with another realtor YES/NO (should be NO!)
4. Customer full address
5. When they think they will be selling or buying?
6. Why they are interested in selling or buying?
7. Are they the decision maker, and/or if there is another person involved will they be at the meeting?
8. What is their plan if they decide not to buy or sell?
9. If what {insert agents name} makes sense and feels like the right move will you be ready to hire them at the meetings? YES/NO (The answer here must be YES!!!!)

PRO TIP: The MREA teaches us the Ten Principles for Empowering People. This is how you Thrive through Training and Coaching!

Ten Principles for Empowering People

1. Tell people what their responsibilities are. Get agreement.
2. Give them authority equal to their assigned responsibilities.
3. Set standards of excellence and guidelines.
4. Provide initial and ongoing training that will enable them
5. to meet standards (skills, knowledge. etc.).
6. Hold them accountable. Define consequences.
7. Provide them with weekly feedback on their performance.
8. Recognize them for their achievements (praise in public; correct in private).
9. Trust them. Allow them to grow into self-leadership.
10. Give them permission to fail.
11. Treat them with dignity and respect.

1. Determine What Metrics Are Being Reported and Tracked

Chances are that as a single agent or team, some or all of the following metrics are being tracked in some way. When adding an ISA into the business, it becomes imperative to start tracking metrics effectively and efficiently to gauge how your ISA is meeting their goals and the impact they are having on your business.

Below is a list of commonly tracked metrics:

1. Dials - how many attempted contacts were made
2. Contacts added - how many contacts who had a real conversation with were added to the database
3. Nurtures - this is someone who has been added to the database that intends to transact in a defined period of time
4. Appointments set - an actual appoint to speak with a buyer/seller has been set
5. Appointment held - the appointment that was set actually happened
6. Agreements signed - a buyer's representation or listing agreement has been signed
7. Closings - a buyer or seller closed on on a transaction

Setting Goals to Track

We set goals around two types of activities, lead measures and lag measures. Lead measures are the activities that come before the desired result and lag measures track the result that we desire. In the list above numbers 1, 2, and 3 may be lead measures and numbers 4, 5, 6, and 7 may be lag measures. The goals that you put in place must support the activities, in the right order, to support your desired outcome. The lead measure goals should be based on what the desired outcome is while keeping in mind what the lead source that they are contacting is because the conversion rates from contact to appointment change based on the lead source. It makes sense that there would be a higher conversion rate on incoming warm leads to an appointment than on circle prospecting.

The math below was provided to us from Anna Krueger who explained that once an appointment is set the conversion rates should hold fairly similar across most sources. This means that the number that changes most drastically will be “contact to set”. The other variable here is how each person decides to define what an appointment is.

Below is a quick look at some conversion rates across multiple sources of leads that you can use as a rough guide:

Examples of a blended conversion rate table for an ISA contacting people from 3-5 different lead sources:

1. Dial to Contact: 12%+
2. Contact to set: 5%
3. Set to held: 70%
4. Held to signed: 80% (agent and ISA)
5. Signed to closed: 80% (agent)

As stated above when the lead source changes, the “contact to set” numbers change the most and the majority of the other numbers remain the same. Below is a rough example based on Anna’s research across several different lead sources:

1. Contact to Set Appointment for Circle Prospecting leads - 1-2%
2. Contact to set Appointment for Expired and FSBO leads - 10%
3. Contact to set Appointment for PPC (internet) leads - 4%

The numbers above represent an ISA with great conversations, a large contact list, contact follow ups made on time, and the word “appointment” is defined as the agent has a true chance of doing business.

How to Report and Track

Once you establish the goals and the items that you wish to track, there are many different ways to report and track the metrics. There is no right way, this is all about what works for you. First we track things that we have decided are important and then we report on them so that everyone is on the same page. We've created two different lists of how your ISAs can track and report.

Track	Report In
Spreadsheets (Google Sheets or Excel)	Daily Texts
Electronic scoreboards like Sisu, Geko board	Daily Emails
CRM Reporting Tool- like command	Electronic Forms (Google Forms or Jotforms)
Other tools (Tableau, Zoho, etc.) Phone tracking system	CRM Reporting Tool Slack Daily wrap up phone call

Some of these options will be easier to use than others and require less setup and cost. If you're starting off with your first ISA, you may opt for an easier method to start learning what works best for you while keeping expenses low. We strongly encourage you to make use of Command and keep your costs down!

Reporting happens everyday; this is how we hold every dollar that we are investing accountable. Use a tracking system that is easy and convenient. The best tracking system/CRM is the one you use and that everyone involved can see.

PRO TIP: Gamify tracking your metrics to keep agents active and motivated!

Reference Tech Play #34 and T-2 to learn more about how you can use technology in this section.

#34 TRACK LEAD GEN ACTIVITIES

AgentS can track their lead generation activities in two ways using Command. First, the reports applet will display contact health score and logged activities like calls, texts, or meetings. Agents can also turn on Activity Tracker. This will send a daily reminder based on the desired schedule (off days/holidays) to log daily activities and mood. Rainmakers can view this at a team level.



LEAD GEN REPORTS

1. Open the reports applet
2. See database overview and last contacted on dashboard
3. Look on the "Reports" tab for a more detailed database report



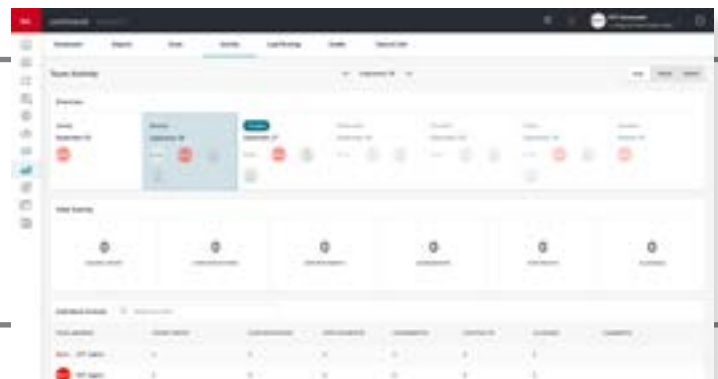
SET ACTIVITY TRACKING

1. Open Settings > Command > Reports > Activity Tracker
2. Schedule daily emails and desired reminders
3. Select default work days
4. Select holidays
5. Scroll and set agent specific days/holidays (teams only)



VIEW ACTIVITY TRACKING

1. Open Reports and Activity tab
2. See profile photos for all submitted activity each day of current week
3. View Summary of total team activity
4. View breakdown of activity by team member



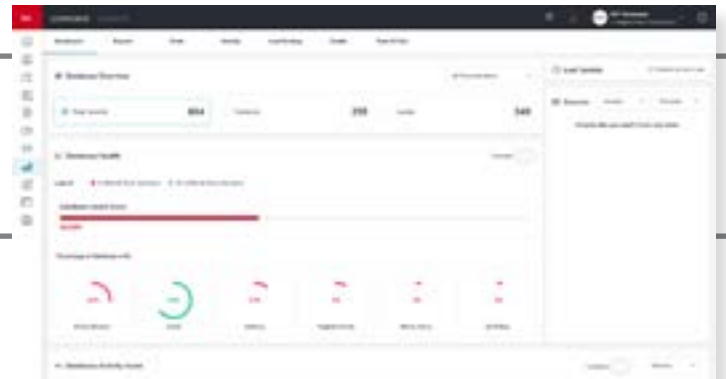
#T2 **REPORTING FOR AGENTS**

Command offerings reporting for agents around database health, opportunities (transactions), goals, emails, and texts/calls (Twilio).



ACCESS REPORTS

1. Open Command > Reports
2. View Dashboard or switch reporting type with tabs at top



REPORTING BY TEAM/AGENT

Use dropdown to alternate between team or individual agent reports.



A positive and collaborative agent - ISA relationship is critical to the success of the ISA department and high lead conversion ratios.

Our favorite description of their relationship came from Sarah Reynolds of EmpowerHome Real Estate. We asked Sarah, “What do you think about ISAs and their position within your organization chart?”. She simply said, “*They are the heart of our organization.*”

In this moment, our entire understanding of the impact that high-quality, highly skilled, and highly motivated ISAs could have on a company changed.

Cultivating a positive environment between you, or the team, starts with understanding the ISA’s role and connection within the organization.

1. Agent and ISA Relationship

The agents and teams that collaborated on this playbook are winning at the highest level with ISA models and all agreed that there were four key elements of thriving with an ISA.

1. ISAs are not “administrative people.” They are the center of the team’s sales organization. Whether you are a single agent or a team, the right ISAs will aid in meeting goals.
2. The ISAs and the way that they converse with the people in the team’s database sets the tone for how those individuals view the company and its culture. Training and conversation practice should be a joint effort between you and/or the whole team and the ISA.
3. The more the ISA knows about the agent they are setting appointments for, and vice versa, the more effective both will be converting the business.
4. Clear expectations on lead workflow and policies avoid unnecessary miscommunications and misunderstandings.

In order to accomplish the four items above, there must be a strong relationship between the ISA and the agents or rainmaker. In order to build a strong relationship, the employer, must use documented processes. As we said in an earlier section, it should include Career Visioning and a 30-60-90.

2. Lead Policies

When it comes to Lead Policies there are a few things to consider to ensure success of the ISA, a strong relationship with your or team, and ultimately conversion.

1. Who owns the lead?
2. How many leads can an ISA work at one time?
3. How will leads be distributed to the ISA?
4. How will leads flow between ISAs and agents?

Who owns the lead?

Your odds are your first ISA will not be your last. In reality, you will probably hire upwards of five ISAs before you find a great one. That's not meant to discourage you, but to make the point that lead ownership is an important piece of running a successful sales division. As simple as it sounds, lead ownership boils down to "who owns the lead". This becomes a little more prevalent on teams, but it can absolutely show up with single agents and their ISAs. Ultimately, the question you are asking is "if this ISA leaves, am I allowing them to take my leads with them?" The short answer is probably NO WAY. The agreement with your ISA should clearly state who owns the lead both while they are working with you and when they are not. The same should go for any agent on your team!

1. How many leads can an ISA work at one time?

You might think the answer here would be, all of them! ISAs should only be working as many leads that allow them to provide each person with the level of service and care that you expect. If you're just starting out, it may take some time for you, and your ISA, to know how many leads they can efficiently work at one time. Aided by technology, using automated follow up plans and touches will allow your ISA to work more leads without having to touch every single one every day.

3. **How will leads be distributed to the ISA?**

Lead distribution will be more relevant if your ISA is joining a team or if the Rainmaker will be handling leads alongside the ISA. Understanding how leads will be distributed is important because it will help to avoid any issues with who and how someone was supposed to get a lead.

Below are five ways to distribute leads to ISAs or agents on a team:

1. **Round Robin** - This is one of the more simple, and common, ways to distribute leads. Round Robin means that all ISAs (or agents) receive the same number of leads in the same order.
2. **Cherry Pick** - Cherry Picking allows the ISAs to pick any lead from a pool of leads that they want. This method can create some competition to find the “best” leads. This might be a good option if you have a large lead pool and can be coupled with another method based on lead source.
3. **Area Specific** - This is a farming method where the manager (Rainmaker or Sales Director) chooses areas that certain ISAs work. This method works best when your lead generation is focused on farming or circle prospecting.
4. **Hot Hand** - Hot Hand distribution is where leads are handed to ISAs based on their skill level and experience. For example, you may give warmer leads out to a more experienced ISA whereas a new lead may be best suited for a new ISA.
5. **Manual** - This is where the Rainmaker or Sales Director is manually handing out leads to individual ISAs. This can be a more time consuming method. If you don't have, or aren't receiving many leads, this can be a good way to dip your toe in the lead distribution pond.

The best method for YOU will be the one that best suits the number of ISAs or agents you have, the leads they are calling, and how much time you have to distribute the leads.

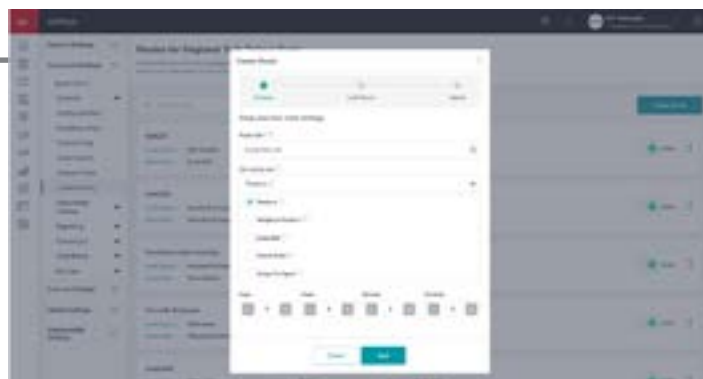
Reference Tech Play T-1 to learn more about how you can use technology in this section.

Agents can set up multiple lead routes to accommodate a variety of lead sources, rules, & schedules. Create and prioritize routes by the desired schedule using one of five rules available. Set the claim action deadline to increase your speed to lead. Routes can include all or a selection of agents.



CREATE LEAD ROUTE

1. Open Command > Settings > Contacts > Lead Routing
2. Select "Create Route"
3. Add title & set routing rule
4. Set route schedule
 - a. Day of week and times
5. Set claim action deadline
 - a. days, hours, minutes, seconds
6. Select lead source(s)
7. Select Agent(s)
8. Confirm "Save"



RULES

Random - randomly distributes leads to each team member included in the route. Every agent has an equal chance of getting the lead, but no agent will be the first person to get a lead, twice in a row.

Weighted Random - create a lead distribution ratio between team members, ensuring that some agents get more leads than others. Later in the process, you will give each team member, included in the route, a percentage amount that will cumulatively equal 100%. These percentages are calculated as probabilities for leads to be randomly distributed to these agents.

Jump Ball - every team member in the lead route will receive the lead. The first person to claim it, gets it.

Round Robin - sends leads to agents in an ordered list. If an agent doesn't claim the lead in the allotted time, it will go to the next agent on the list. If none of the agents claim the lead, it will be sent to the Lead Pool.

Assign to Agent - you will set one agent, from your team, on this route. All leads from the lead sources in the route, will be automatically assigned to this agent, without them having to claim them. This route will override any other lead routes that contain the same lead sources and date/time designation.

4. How will leads flow between ISAs and agents?

Determining leads flow between ISAs and agents ensures clear lines of communication with not only themselves, but with consumers as well. There are 3 typical ways that leads can flow between ISAs and agents:

1. Lead Source → ISA → Agent
2. Lead Source → Agent + ISA
3. Lead Source → Agent → ISA

The most common flow is Lead Source → ISA → Agent.

This is simply where all leads go to the ISA first and the ISA then hands them off the agent(s). If the lead needs more nurturing, it goes back to the ISA.

The second flow, Lead Source → Agent + ISA,

is where the ISA and agent work together to nurture leads and build rapport. This is less commonly used, but can be effective!

The last flow, Lead Source → Agent → ISA,

has the lead first going to the agent and then the ISA. This model has the agent making first contact and attempting to start a relationship. If they can't, the lead goes to the ISA to nurture. As we've said before, there is no one way to do this. If you try one and it doesn't work, try another! There is going to be trial and error throughout this whole process.

3. ISA Daily Structure & Schedule

Creating some structure around your ISAs working hours will not only aid in accountability, but it will give you a baseline to make changes when inspecting what is working and what isn't.

A daily schedule goes beyond telling someone that they “work from 9am to 5pm.” The right ISA structure includes **WHAT** they will be doing during their working hours and **WHEN** they will be doing it. Below are a few examples of schedules we have collected from agents and teams that are having great success using ISAs in their business.

Schedule

Example #1

- 5 days per week - Monday - Friday
- 8 working hours each day
- 2 call blocks: morning-3 hours + afternoon-3 hours
- Small lunch in between call blocks
- Remaining time spent doing “admin” work

Example #2

- 6 days per week: Mon - Sat .
If more than one ISA, 1 works on Sunday to answer weekend call-ins and referrals.
- Each day is broken down by 90 minute call blocks followed by a 15 minute break.
- 1 hour to focus on follow up

Activities

Aside from determining their general working hours and schedule, it's important to determine the activities being performed in those hours. Below are a few examples of activities performed in an ISA's day.

Example #1 (8 AM - 5 PM)

- **8-9am:** New leads that came in overnight
- **9-10am:** Nurture leads and complete follow up tasks
- **10-12am:** Dial session
- **12-12:30pm:** Lunch
- **12:30-1:30pm:** Follow up and administrative tasks
- **1:30-2pm:** Conversation practice & Objection handling
- **2-4pm:** Dial session
- **4-5pm:** Follow up and administrative tasks

Example #2 (9 AM - 6 PM)

- **9-9:30am:** Huddle and Conversation practice
- **9:30-11:30am:** Outbound prospecting
- **11:30-12pm:** Follow up tasks and admin work
- **12-12:30pm:** Lunch
- **12:30-2:30pm:** Inbound Prospecting
- **2:30-3pm:** Follow up and administrative tasks
- **3-3:30pm:** Conversation practice and Objection handling
- **3:30-5:30pm:** Choose your own adventure dials/prospecting
- **5:30-6pm:** End of day follow up & administrative tasks

PRO TIP: In all of the examples above, notice that the goal is to have about 75 percent of the ISA's day spent in active lead generation 15 percent should be for administrative tasks are vital to the ISAs success because they lead to nurtures and appointments and play a key role in your conversion rates.

6

Inspect What You Expect

Far too often people assign work to others and then assume that the work was completed at a standard that they find acceptable. More often than not this leads to poor results and very little consistency. Inspecting what you expect is more than reviewing what you are tracking; it is about reviewing the data, being willing to change WHAT you're doing, and also HOW you're doing it in order to improve the results.

Gary wrote in *SHIFT*, “*spend no more money until what you're doing proves its success.*” This means that we must decide what we are doing, how we are tracking it, if we are comfortable with the proforma and the cost to execute the project, and then give the project enough time to either prove effective or ineffective, and only THEN make changes.

Introducing ISAs into your business should immediately lead to more contact attempts and more consumer conversations, but it will take some time for closings to arrive. If your ISA is calling internet leads for example, they may be much further away from buying and selling than a referral from a friend. It will take an average of six months to see your ISA's efforts come to fruition. Keep that in mind when inspecting what you're doing and how you're doing it.

1. Evaluate What Is and Isn't Working

Inspecting ISA Skills

See the coaching section!

Inspecting ISA Conversations

Your ISA is an extension of you and your brand. It is important that you are listening to their LIVE conversations with customers and leads so that you can ensure that you are pleased with how you are being represented.

PRO TIP: If your ISA records their calls, ask them to send you their five best calls and worst calls from the week. Celebrate the best calls and coach and train with the others! This is our version of *Game Film*!

Inspecting Lead Sources + Flow

Lead generation is about having a strategy and reviewing it often. First, look at where your leads are coming from. Consider their cost, their conversion rate, and if they are sellers or buyers. Take away the things that aren't working and double down on the things that are.

Inspecting your CRM

If your ISA is speaking to people, then they better be adding notes to your CRM! Not all notes are created equal and the higher quality the notes are, the easier it is to hand the lead off or pick up where one ISA leaves off if they should leave the role.

PRO TIP: Notes need to tell the story of the relationship being built, not just real estate information!

We started this playbook by saying that as your database grows in number so grows the number of conversations that you will need to have to ensure your conversion rate stays at the level that you desire.

Remember, *“it is impossible to hit your goals without expanding your lead generation activities”* (SHIFT page 56).

During our interviews and research for this playbook, we heard these truths articulated time and time again and the solution that led to more freedom, more profit, and more enjoyment at work was the addition of a high-powered ISA.

There is no question that when you bring the right person into this role, train and support them at the highest level, and inspect the results, you will find that there are few hires that can have a more profound effect on your business than an Inside Sales Agent.

3 Questions

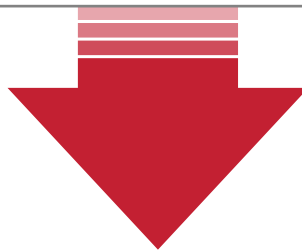
**What am I
hiring an
ISA for?**



**Can I make
the upfront
investment?**



**Can I provide
the ISA ongoing
training and
support?**



HIRE

Keller Williams ISA Resources:

Leverage Series: <https://www.kwconnect.com/page/kwu/leverageseries>

How to Hire, Train, and Retain ISAs hosted by Anna Krueger: <https://mapscoaching.com/program/how-to-hire-train-and-retain-isas/>

Other playbooks found here: <https://agent.kw.com/connect/learning/topics/10401>

ISA Conversations

The following conversations do not include all conversations, but are a great place to start!

LPMAMA (Call in):

Agent: Hi, this is (Agent Name) with Keller Williams (Market Center name), how may I help you?

Client: I'd like to see the house at 123 Main Street.

Agent: Awesome, let me pull up the showing instructions. What was your name:

Client: Insert Name

Agent: Awesome! I'll pull that up now. Are you looking to buy in that area?

Client: Yes, I love the subdivision.

Agent: I know! Me too! How long have you been looking?

Client: A few months. Could I see this one today?

Agent: My computer is running slow, I know we can get you in. I just need to double check with the seller. Is this the price point you are looking for? I think we have a couple of other properties around there getting ready to come on the market.

Client: I'm looking up to \$500,000.

Agent: Awesome! How soon are you hoping to find a property.

Client: As soon as I find the right one.

Agent: I get that. This is a great area. Why are you looking to move?

Client: We want to be in that school district before next fall.

Agent: That's great! How many kids do you have?

Client: Answer.

Agent: I'd love to get you in this house. The seller does require some notice. Are you working with an agent?

Client: No, I'm just calling listing agents.

Agent: Okay. Well, like I said we have other properties that are also coming up in the area. I'd love to help you find the best home in this area for you ahead of fall semester. Have you already met with a lender or do you need a recommendation?

Client: I haven't met with anyone.

Agent: Okay, great. Let's meet this afternoon at the office around 2:00. We can run through what you're looking for in addition to the area. I can give you a few local lenders that we work with for you to connect with. Then we can go check out this house and any others that might be a great fit!

Open House Circle Prospect:

Hi! My name is (insert name) with Keller Williams (Market Center name), I am holding the property at 123 Main Street open on Sunday from 2-4. I wanted to invite all of the neighbors to come take a peek. Will you be around to stop by?

<YES>

Awesome, I hope to meet you then. We would love for you to give us some feedback after you check it out. Do you have anyone that you know that might love to be your neighbor?

<IF YES> ...get the referral.

<IF NO> That's okay... there is still time (make a joke). While I have you on the phone, would you like me to send an updated market report on your home?

<If yes>...get details ... ask if motivated to move, etc. Offer to drop off CMA to verify on the way to or from the open house.

Follow Up Call after the OH if the OH was Successful

Hi there. This is (agent name) with Keller Williams (Market Center name). How are you today? >>> Awesome, we spoke on Thursday (or I left you a voicemail on Thursday) and wanted to let you know how the open house we held in your neighborhood turned out. Is this a good time?

<YES>

Awesome, thanks for taking my call. We had X number of people through the open house and received X number of offers. We have Y number of buyers that are still looking to move into your neighborhood. Do you know of any of your neighbors that are moving before the end of the year?

<NO>

Well, have you considered selling your home?

<NO>

I get it, you live in a great area! Listen, I really appreciate you taking the time to chat with me today. I'd love to thank you by sending you an updated market analysis of your home. Could I get your email address so I can send that over to you? XXXX. Awesome, any updates that I should take into consideration before I send this over to you? (All we are doing is adding them as a nurture and making sure we have the 4 pieces of info).

OR

Well, have you considered selling your home?

<YES> CLOSE FOR THE APPOINTMENT

If the OH was not a success

Hi there. This is (agent name) with Keller Williams (Market Center name) .How are you today? >>> Awesome, we spoke on Thursday (or I left you a voicemail on Thursday) and wanted to let you know how the open house we held in your neighborhood turned out. Is this a good time?

<YES>

Awesome, thanks for taking my call. We had X number of people through the open house. As of now, we have not received any offers. Many buyers that came through the house were looking for (insert criteria like a more open layout or different number of bedrooms). Do you know of any of your neighbors that are looking to sell their home by the end of the year?

FROM here follow earlier conversation

Expired:

Objective: Set an appointment...we will get the listing at the appointment.This is just to set the appointment.

Agent: Hi there, I don't know if you can help me or not.Is this the owner of 123 Main Street?

Client: Yes, who's this?

Agent: Hi, this is (agent name) at Keller Williams (Market Center name).I noticed that your home is no longer on the market. Are you still wanting to sell?

Client: We are just taking a break for now, we weren't getting any (activity/offers)

Agent: I understand.Would you still be willing to sell?

Client: I would, but we just want to take a break for a bit.

Agent: Okay. May I ask, why do you think you weren't getting any (activity/offers)?

Client: I don't really know. I think it's a great house and we priced it well. It's disappointing.

Agent: I understand! Outside of being disappointed and wanting to take a break, is there anything else that is stopping you from selling?

Client: No, we are just frustrated.

Agent: May I ask where you were planning to move if the house did sell?

Client: Answers with next step

Agent: Dig into motivation. Ask what the impact is if they get to move and impact if they don't (future pain).

Client: Answers

Agent: You know, I'd love the opportunity to meet with you to see if we could help you get to (location) by (timeline). Would you have time today at 3:00 to meet?

Client: I just don't think we are ready to list it again.

Agent: Honestly, I'd love the opportunity to just meet you and see if I can help. It will take 10-15 minutes and you will get feedback on what could help your home sell the next time around. Would 3:00 work or would 4:00 be better?

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.

FSBO:

Objective: Set an appointment...we will get the listing at the appointment. This is just to set the appointment

Agent: Hi there, I don't know if you can help me or not. Is this the owner of 123 Main Street?

Client: Yes, who's this?

Agent: Hi, this is (Agent Name) with Keller Williams (Market Center name). I saw that you have your property on the market. May I ask how it's going?

Client: We are getting a ton of agent calls.

Agent: I'm sure you are, it's a great house! Are you getting a lot of calls from potential buyers?

Client: A few.

Agent: That's great! Have you seen it yet?

Client: We have and we have an open house on Sunday.

Agent: Awesome. What has the feedback been from those who have seen it?

Client: Nothing yet.

Agent: Got it, so you haven't received an offer?

Client: No, not yet.

Agent: Is there a reason you decided to sell it by yourself, without an agent?

Client: I'd like to save some money.

Agent: Okay. Outside of potentially saving money, is there any other reason you wouldn't work with an agent?

Client: No.

Agent: Okay! How did you set the price of the home?

Client: I looked at other properties online in my area and got a feel for what things were selling for.

Agent: That's great. Have you had anyone verify that price for you?

Client: No....I really don't want to list it yet. I'm going to try it on my own.

Agent: Do you have an idea of how long you would like to try it on your own?

Client: A few weeks, I think it will sell fast. Plus, I have the open house this weekend.

Agent: I'd love to see if I can help. One of the things we specialize in is netting those that start at a FSBO as much or more when they utilize our marketing plan. Would you have some time this afternoon that I could swing by and run through it with you?

Client: I don't know, I really don't want to list it. I have the open house coming up on Sunday and am expecting a big turn out.

Agent: That is exactly why I should swing by today. Let me give you a second opinion on the price of the home and make suggestions of what to do to get ready for the open house. Would 3:00 work?

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Internet Leads:

Agent: Hi, is this (insert name)?

Client: Yes it is, who's this?

Agent: Hi, this is (Agent name) with Keller Williams (Market Center name). How are you today?

Client: I'm fine, why are you calling me?

Agent: Well, it looks like you were looking for information about 123 Main Street. What questions can I answer for you?

Client: Oh, I'm just looking. How did you get my information?

Agent: I love looking at houses! It looks like you registered for more information. How long have you been looking at houses?

Client: A few months or so I'm not ready to buy. I am just looking.

Agent: Absolutely, its best to start looking early so you have a feel for the market. Do you know when you want to make a purchase.

Client: No, not really.

Agent: Okay, well I work with many buyers well before they decide to make a purchase. Have you sat down with an agent to come up with a strategy to buy when the time is right?

Client: No, I'm just looking.

Agent: I completely understand. It is a super exciting time to buy a house, yet it can also be a bit overwhelming. I'd love the chance to meet with you for a strategy session. We can talk about the market, what you think you want in a home and then the road map to buying something. Many times buyers feel better just knowing what the next step is. Would 3:00 today work for you?

Additional Resources:

How to Hire, Train, & Retain ISAs



Mega Lead Conversion



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