<u>ESSENTIALS LIST FOR AGENTS LEAVING A TEAM</u>

1. Database & Command Transition

This is the most critical step. Your Team Agreement dictates who owns which contacts.

- **Review the Team Agreement:** Check the "Non-Compete/Data Ownership" clause to verify which contacts you can legally take (usually personal sphere of influence vs. team-generated leads).
- **Export Authorized Contacts:** Before your team Command access is revoked, export the contacts you are contractually permitted to keep into a CSV file.

  https://answers.kw.com/hc/en-us/articles/360035962574-Export-Contacts-in-Command

- **Request Contact Release:** Ask the Rainmaker (Team Lead) to officially "release" your personal contacts from the team account to your individual KW Command account.
- **Disconnect SmartPlans:** Unsubscribe your personal contacts from team-branded SmartPlans so they don't receive automated emails from the team after you leave.

  https://answers.kw.com/hc/en-us/articles/360041825413-Remove-Contacts-from-a-SmartPlan

2. Pipeline & Opportunities

Unfinished business needs clear boundaries so everyone gets paid correctly. ***<u>Team Dissolution Agreement needed on file with the MC.</u>***

- **Audit Active Pipeline:** Create a spreadsheet of all your current active clients, under-contracts, and pending deals.
- **Define Commission Splits:** Document the split for every pending deal with the Rainmaker. (Standard practice: Deals under contract usually close under the team split; active buyers/listings may be subject to a referral fee).
- **Update Command Opportunities:** Ensure all current pipelines are accurately submitted in Command for Compliance/MCA review to avoid commission delays.
- **Submit Referral Agreements:** For any pipeline clients you are taking that require a future payout to the team, execute official KW Referral Agreements *before* changing your status.

3. Marketing & Digital Assets

You need to swiftly untangle your personal brand from the team's identity.

- **Audit Online Profiles:** Update your bio, headshots, and team affiliation on:
  - KW.com & KW Consumer App profile
  - Zillow, Realtor.com, and Homes.com
  - Social Media (Facebook Business Page, Instagram, LinkedIn)
  - Google Business Profile
  - Voicemail
- **Update Email & Signatures:** Remove team logos, slogans, and team email addresses. Ensure your individual `@kw.com` email is your primary contact.
- **Order New Collateral:** Order single-agent business cards, open house signs, and "For Sale" signs that comply with local state board and KW branding guidelines. https://www.kwrocresources.com/ under the Logos & Marketing tab

  https://www.kwrocresources.com/pixos to order and see examples of compliant signs etc

4. Market Center Business

Make it official with your leadership team.

- **Notify Leadership:** Schedule a brief meeting with your Team Leader (TL) and Market Center Administrator (MCA) to announce the transition.
- **Review Financials & Cap:** Check your current cap status. Understand how your capping anniversary date might be affected now that you are paying individual splits to the Market Center.

  https://answers.kw.com/hc/en-us/articles/29894640435091-View-Your-Cap-Status-in-Command

4. Submitting Paperwork & Compliance

Get set up for SUCCESS with paperwork as a solo agent.

- **Getting Paid in Command:** Get familiar with our MC Paperwork Policy (below) and touch base with RC Benjamin on all things regarding compliance rcbenjamin@kw.com. There are videos below to watch or plan to attend RC's monthly class on Submitting Paperwork typically the 3rd Monday of each month at 11am.

https://drive.google.com/file/d/1Zn5zCHZAu_IgifcRoZqyfV7MOq_3PQ2p/view

https://www.youtube.com/playlist?list=PLRnNOqwEE8ADYMSzdXzxWKJ_AgnQS9sI0

https://drive.google.com/drive/u/4/folders/1h_B2XIsMi-Icx_aMCvellyV7bV7cgCdi

GOING SOLO: PUNCH LIST

The transition paperwork gets you out of the team. This list gets you running as a business. Work it in order.

1. Replace What the Team Was Doing For You

List every service the team provided, then assign each one a new owner: you, a hire, or a vendor.

- **Transaction coordination:** Decide DIY or hire a per-file TC. If hiring, interview and onboard before your first solo contract, not after.
- **Inventory your tool stack:** List every team-owned tool you currently use (dialer, Canva, BombBomb, showing service, dotloop templates, e-signature account). Identify which disappear with your team access and replace or cancel each one.
- **Confirm asset ownership:** Verify who owns your website, domain, Google Drive files, and any landing pages. Migrate or rebuild anything that belongs to the team.
- **Rebuild your vendor bench:** Establish your own relationships with a photographer, stager, sign installer, and preferred lender and title contacts.
- **Restock physical inventory:** Order your own lockboxes, sign riders, and open house supplies. Return everything team-owned.

2. Lead Generation and the Announcement

You are leaving a lead source. Replace it before you need it.

- **Build your solo lead gen plan first:** Identify your two primary lead pillars and put daily activity numbers on them before your exit date.
- **Script the announcement:** Write one core message framed as a new chapter, not a departure. Adapt it for call, text, email, and social. Never disparage the team.
- **Run a sphere re-engagement campaign:** Personal call or text to your top 50 within the first two weeks. Everyone else gets the email and social announcement.
- **Set your database cadence:** With team touches gone, build your own SmartPlan or touch calendar so your sphere hears from you on a schedule, not when you remember.

3. Financial Restructuring

Your economic model just changed. Rebuild it on paper before the first commission check.

- **Rebuild your budget:** Add every expense the team used to cover: marketing, tools, TC fees, signage, photography. Know your new monthly nut.
- **Update payment details with the MCA:** New W-9 and direct deposit if you were previously paid through the team's entity.
- **Set up bookkeeping and tax reserves:** Open a separate business account, pick a bookkeeping system, and set a percentage aside for quarterly estimated taxes.
- **Consider an LLC or PLLC:** Talk to your accountant about entity structure now that all income flows directly to you.
- **Run your solo economic model:** New splits, new costs, no team leads. Calculate how many deals you need to hit your income goal and build your 1-3-5 from that number.

4. Active Listing Logistics

Commission splits are only half of it. The MLS and the front yard need updates too.

- **Update your MLS designation:** Remove the team affiliation on your MLS profile and confirm active listings reflect the correct agent of record.
- **Review listing agreements:** Confirm whether agreements signed under the team name need amendments to reflect your new status. Check with compliance before assuming.
- **Swap signage on active listings:** Replace team signs with your solo signs on every active property.
- **Return team equipment:** Lockboxes, signs, office keys, and anything else with the team's name on it goes back, documented.

5. Reviews, Attribution, and Phone

A solo agent with zero reviews looks brand new. Do not start from zero if you do not have to.

- **Audit your review footprint:** Check where your Zillow and Google reviews actually live. If they sit on the team profile, request transfers where the platform allows it.
- **Ask recent clients to re-review:** Send your last 10 to 15 closed clients a direct link to your individual profiles.
- **Claim your past sales:** Confirm your closed transactions are attributed to you on Zillow and Realtor.com, not only to the team.
- **Solve your phone routing:** If your number was a team line or calls forwarded through team systems, port the number or publish your new one everywhere before access is cut.

6. Structure and Accountability

No more huddle. No more rainmaker watching your numbers. Build the structure before you miss it.

- **Time block your week:** Lead gen, appointments, admin, and learning all get standing blocks on the calendar. Protect the lead gen block first.
- **Set your training plan:** Schedule an Ignite refresher or BOLD, and pick one skill gap to close in the next 90 days.
- **Choose an accountability structure:** Coaching, a productivity group at the Market Center, or a peer partner with a weekly numbers check-in. Pick one and put it on the calendar.
- **Track your numbers weekly:** Contacts, appointments, agreements, closings. You are the only one watching now, so build the scoreboard.