KW Experience Producing Agent Transition Checklist

(to be completed after onboarding)

If you Have Active Listings:

- 1. Have your seller sign a new listing agreement with Keller Williams Experience
- 2. Relist your active listings today once your MLS membership has switched over to KW Experience
- 3. Call your seller to let them know that their listing is now active again in the MLS!
- 4. Replace your old brokerage For Sale sign with a KW Experience for sale sign. If you would like to pay someone to do this for you, you can contact Bob with Bob's Sign Company at (630) 901-0489 or bobssign.com
- 5. Update the marketing materials for any of your active listings to remove your old brokerage's logo and replace it with the KW Experience logo. Reshare or redistribute the new marketing materials

If you Have Properties Under Contract:

- Let your clients know that you have switched brokerages, but that it won't impact them or your transaction whatsoever

All Agents Should Complete The Following:

- Update your voicemail to state that you are with Keller Williams Experience
- Order KW open house and for sale signs
- Order KW business cards
- Update your email signature
- Update all of your online profiles to reflect that you are with KW Experience:
  - Facebook (personal account)
  - Facebook Business Page
  - Instagram
  - YouTube
  - TikTok
  - LinkedIn
  - X (Twitter)
  - Snapchat
  - Google Business Profile
  - Zillow Profile
  - Realtor.com Profile

    - Your personal website (if you have one)
    - Yelp
    - NextDoor
- Make a social media announcement about your move over to KW Experience on each of your social media platforms:
    - Facebook (personal account)
    - Facebook Business Page
    - Instagram
    - YouTube
    - TikTok
    - LinkedIn
    - X (Twitter)
    - Snapchat
    - Google Business Profile
    - Zillow Profile
    - Realtor.com Profile
    - Your personal website (if you have one)
    - Yelp
    - NextDoor
- Call or text the following groups of people to let them know that you have moved over to KW:
    - Active clients
    - Past clients
    - VIPs
    - Vendor partners
    - Referral partners
- Schedule 4 tech appointments (ideally 1 per week) with your Technology Transition Specialist, Noel Marrero, to cover the following topics:
    - Appointment 1: System Basics & Opportunity Workflow (including LoneWolf Transact)
        - Focus: Command overview, downloading and logging into the Command mobile app, and database clean-up best practices.
    - Appointment 2: Database Segmentation & Transition Announcement
        - Focus: Database clean-up best practices, organizing your sphere, and updating your public presence to reflect KW.
    - Appointment 3: Transactions Management & Commissions
        - Focus: Learning how to build out transaction workflows and checklists. You will also review the compliance part of transactions and commissions for getting paid.
    - Appointment 4: SmartPlans & Direct Outreach

- Focus: Automating follow-up strategy and personally reaching out to your most important contacts.

Scan The QR Code Below for Access to Producing Agent Transition Resources