

NEW AGENT HANDBOOK

USEFUL CONTACTS

PROPERTY PHOTOGRAPHY COMPANIES

SPOTLIGHT HOME TOURS

www.spotlighthometours.com

10 W Broadway Suite #750 • Salt Lake City, Utah 84101

Customer Support: 801.953.0624

Office: 801.466.4074

OBEO

www.obeo.com

563 West 500 South - Suite 130, Bountiful, UT 84010

Phone: 800.729.6236

SIGN PRINTING COMPANIES

IRON HORSE INSTALLATIONS • Josh Banks

www.ironhorseinstallations.com

PO Box 682135 • Park City, Utah 84068

Phone: 435.640.7485

ihisigns@gmail.com

PARK CITY POSTMAN • Al Pilgrim

www.parkcitypostman.com

1203 Lime Canyon • Midway, Utah 84049

Phone: 761.519.3942

Info@parkcitypostman.com

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LOGINS & PASSWORDS

Please complete this form as you obtain usernames/passwords and keep it for your reference. Please do not change the assigned passwords for atleast two weeks after your initial orientation.

KW.COM	_____	_____
	username	Keller11 password

KW EMAIL	_____	_____
	username	Keller11 password

DotLoop	username	Keller11
		password

PCMLS Member ID: _____ password _____

WFMLS Member ID: _____ password _____

eAgentC Website URL _____

eEdge Website URL _____

Printer Access Code _____

OFFICE LOCATIONS

MAIN OFFICE - SUN PEAK

1750 Sun Peak Dr
Park City, UT
435.649.9882

DEER VALLEY PLAZA

1375 Deer Valley Drive
Park City, UT 84098

MAIN STREET

693 Main St
Park City, UT 84098

HEBER CITY

2 N Main St
Heber, UT

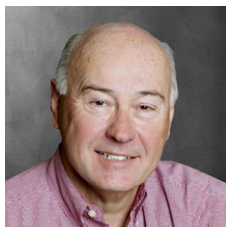
OWNERSHIP



Scott Agnew
Operating Partner

The organizational structure of each market center encourages shared decision making among owners, leaders, and agents. The Keller Williams franchise agreement requires a separation between the ownership of a market center and its leadership. Market centers are owned by an Operating Principal but managed by a team leader. The OP recruits a core of top-performing agents to launch the office. These agents become the bedrock of the market center and help the team leader attract additional agents. All owners are currently actively selling real estate or are in a closely related industry. This agent ownership sets Keller Williams apart from our "Wall Street" owned corporate competitors.

Investor Owners



Ken Drummet



Chris Eberlein



Matt Green



Carol Anne Kret



Bonnie Peretti



Lee Stern



Greg Cutt
Branch Manager, Guaranteed Rate Mortgage

OFFICE STAFF



NANCY SERAPHIN

CEO & Team Leader

435.659.7773 • nancy@kwparkcity.com

PRIMARY DUTIES

- Lead Market Center in growth and profitability
- Financial Management of Market Center
- Manage all Staff
- Training and Education
- Associate Coaching and Business Planning



PAM POLYCHRONIS

CFO & Market Center Administrator

435.640.9346 • pamp@kw.com

PRIMARY DUTIES

- Financial Management of Brokerage
- Monthly Reporting - Ownership Group
- Earnest Money Deposits
- Trust Account Management
- Administrative Staff Management



DAVID DORIUS

Principal Broker

435.640.3500 • david@ddresortproperties.com

PRIMARY DUTIES

- Legal Compliance administration - contracts, escrows, and listings
- Orientation of new associates
- Negotiates all company leases on behalf of brokerage ownership
- Education and Training
- Associate-Client Relationship Management
- Associate Coaching and Business Planning



HEATHER HUONG

Assistant MCA & Transaction Coordinator
435.714.8181 • heather@kwparkcity.com

PRIMARY DUTIES

- Review under contract files in DotLoop
- Process commission checks for Agent closings
- Assist in all Market Center Administration duties
- Conduct Dotloop training classes for Agents
- Transaction Coordination Services



LORRAINE HEGELSON

Agent Services Coordinator
435.649.9822 • lorraine@kwparkcity.com

PRIMARY DUTIES

- Greet all associates and visitors with enthusiasm
- Operations coordinator for team meetings and training classes
- Assist Team Leader with recruiting
- Assist Principal Broker with Orientation
- New Listing Transaction Coordination



KATE SPEARS

Marketing Coordinator & Graphic Designer
801.436.7604 • kate@halcyongraphicdesign.com

PRIMARY DUTIES

- Graphic Design
- Print Advertising (Homes & Land, Park Record, etc.)
- Print Production & Execution, including Geo-targeting
- Email Marketing & Mailchimp Planning
- Marketing Strategy
- Logo & Branding Design

LAUNCH CHECKLIST

ORIENTATION

- ☐ meet with the Broker and Agent Services Coordinator to review company policies and contracts and sign contractual paperwork
- ☐ receive agent information sheets
- ☐ obtain a professional picture & send to Agent Services Coordinator
 - Georg Koblasa • 435.640.7634 • gkasc@onestop.net (Park City)
 - Todd Hicken • Impact Photography • 435.654.2726 • todd@rimlight.com (Heber)
- ☐ write 200 word bio & send to Agent Services Coordinator within your first 5 days

ON YOUR OWN

- ☐ set up voicemail on cell phone and/or office phone with Keller Williams Park City office
- ☐ enter 200 contacts into excel spreadsheet/database
- ☐ watch KWConnect training videos (kwconnect.kw.com)
- ☐ complete buyer listing presentation packet
- ☐ complete listing presentation packet
- ☐ add Keller Williams Realty as additional insured on your auto insurance within your first 5 days
- ☐ send Agent Services Coordinator a copy of your wall license

LEADERSHIP MEET AND CONSULT WITH THE FOLLOWING:

- ☐ Principal Broker & Productivity Coach • David Dorius
- ☐ Submit Annual Business Plan to Principal Broker or attend and graduate IGNITE class within 30 days of your start date
- ☐ Agent Services Coordinator
- ☐ Marketing/Graphic Designer

E-EDGE

- ☐ attend myTransactions: Dotloop
(note: attendance of one Dotloop class is required - classes are held every 3 weeks)
- ☐ attend KW Basic MLS Listing Input Class, which is held bi-monthly

WEBSITE/APP WITH AGENT SERVICES COODINATOR, BY APPOINTMENT ONLY:

- ☐ complete agent profile in kw.com
- ☐ set up your KW website (by appointment only)
- ☐ purchase domain name (optional) through godaddy.com or other sources
- ☐ add mykw to your phone's home screen
- ☐ set up and download your mobile app

PARK CITY BOARD & THE MULTIPLE LISTING SERVICE (MLS)

- ☐ join PCMLS within 5 days of initial orientation
- ☐ complete Code of Ethics
(note: eKey and keybox will not be given until this course has been completed)
- ☐ complete Orientation 100
- ☐ complete New Agent Course (at PC Board or similar)
- ☐ complete Introduction to Real Estate Forms
- ☐ complete Protect Your Clients: Affiliate Services and Professional Standards
- ☐ complete MLS Searches and Reports
- ☐ complete Auto Hotsheets
- ☐ complete CMA Searches, Reports and Packets (Matrix classes)
- ☐ complete Listing Input Classes
- ☐ complete Forms - How to Create and Modify Packets

LAUNCH YOUR BUSINESS

- ☐ attend and graduate IGNITE (mandatory for new licensees)
- ☐ attend BOLD within first 12 months of joining brokerage
- ☐ read The Millionaire Real Estate Agent (MREA) book
- ☐ read The One Thing book (recommended)

PAPERLESS LISTING & DOTLOOP PROCESS

#1 CREATE A CLIENT TREE IN KW DOTLOOP FILING SYSTEM

- ☐ Create a loop and name it by address/client last name
- ☐ Add documents from templates (buying or listing)
- ☐ Once executed, always hit submit for review

#2 CONFIRM YOU HAVE SIGNED & COMPLETED THESE ITEMS

- ☐ WFR Data Entry Sheets (when relevant)
- ☐ PCMLS Data Entry Sheet (SF, Condo or VL)
- ☐ Listing Agency Agreement
- ☐ Completed AND Signed Seller's Property Condition Disclosure Form
- ☐ Upload Photos of Listing

#3 PCMLS - ADD THE LISTING

- ☐ Log on using your personal username and password
- ☐ Click on "Modify or Add New Listing"
- ☐ Click on "Enter a New Listing"
- ☐ Enter Tax ID to auto populate the necessary fields
- ☐ Complete remaining fields then "Save as Incomplete" so you can REVIEW ALL THE INFORMATION before hitting "Submit."

NOTE: Once you hit submit you cannot make any vital changes (i.e. price or photos) until it is activated by the office.

- ☐ IS EVERYTHING CORRECT? If Yes, hit the "Submit" button.
- ☐ Record the MLS# on a piece of paper.
- ☐ At the main Listing Summary Screen select the IMAGE tab and add the photos.

NOTE: Be sure to enlarge photos to fill the full box when you add the photos. This is the only time you can zoom in the photo.

- ☐ Confirm the order of the photos before your final save.

NOTE: The listing will be saved with the status NPB (Not Passed by Broker). The Agent Services Coordinator will review all your paperwork, then activate it for you.

- ☐ Print a Realtor Full Report to a pdf as you will have to upload it with your paperwork to the paperless system.

#4 WFRMLS - ADD THE LISTING:

- ☐ Log On using your personal username and password
- ☐ Select "8-Listing Input"
- ☐ Select appropriate property type
- ☐ Follow the prompts and complete data entry
- ☐ Once all entries are complete, select "I am done..."

- ☐ On the main menu, under "8-Listing Input", select "Photo Maintenance" and load the photos.
 - ☐ Back to the main menu, under "8-Listing Input", select "Property Tour" and select "Photo Tour." This allows the viewer to scan through your still photos. If you have a virtual tour, select the virtual company once you have received notice that the photos are ready and they will link the virtual tour to your property.
- NOTE: I always call the virtual tour company rep to confirm they have the correct MLS# until you are comfortable with their system.**
- ☐ Print a Realtor Full Report to a pdf as you will have to upload it with your paperwork to the paperless system

#5 KWLS PAPERLESS - ADD THE LISTING:

- ☐ Log on using your personal username and password
- ☐ Go to www.repaperless.com/login/parkcity
- ☐ Click on "Add My New Listing"
- ☐ Enter all appropriate information from the listing data entry sheets
- ☐ Once all the fields have been completed scroll down to the "Document Checklist" section. Select the docs you are about to upload.

NOTE: If you are missing any of the mandatory documents the system will demand that you add a note (i.e. - Still waiting on SPCD from Seller)

- ☐ Scroll down to "Upload Documents"
 1. Click on the appropriate title in the "Select Document title(s)" box
 2. Browse for your pdf files on your computer
 3. Click on the button "Upload Another" and repeat steps 1 & 2 until all your files have been selected.
 4. To complete the upload that will send all the paperwork to the front desk so your listing will be activated click the "Submit" button

#6 LISTING DEADLINES:

- ☐ For the Listing to appear on Tuesday's production report, the Front Desk needs the entire listing submitted **NO LATER than 3pm on Monday prior.**
- ☐ For the listing to be activated for the weekend, the Agent Services Coordinator needs the entire listing submitted **NO LATER than 4pm on Friday.**

#7 FINAL STEPS

- ☐ Order a PR, CC&Rs and HOA items for the past 2 years with the company that the agent requests. Keep a copy for yourself.
- ☐ Be Sure to provide your clients with a copy of all the documents. We recommend a nice folder or binder with dividers for their respective documents that they can add to as more documents come into play.]
- ☐ WITHIN 7 DAYS OF LISTING PROPERTY: Dave Dorius has a 2nd checklist that he requires you to submit to the office within 7 days of submitting the listing to confirm you have met and reviewed all the necessary paperwork.

LISTING CHECKLIST

#1 EXCLUSIVE RIGHT TO SELL LISTING AGREEMENT

- ☐ Signed by Seller and Seller's Agent

#2 DATA INPUT FORM (which is part B of the Exclusive Right to Sell Agreement - you need one of the following)

- ☐ Single Family
- ☐ Condominium
- ☐ Land
- ☐ Commercial

#3 WFRMLS INPUT SHEET (if you belong to the WFR MLS)

#4 SELLER PROPERTY CONDITION DISCLOSURE FORM

(completed and signed by Sellers)

- ☐ Condominium
- ☐ Land

#5 MLS ACTIVE PRINTOUT

#6 CERTIFICATION TO WITHHOLD LISTING FROM MLS

(if Seller doesn't want Property immediately advertised through the MLS)

- ☐ Park City MLS
- ☐ Wasatch Front MLS

KW WEBSITES

www.kw.com (KW International) Our flagship web site for access to our company-wide listings (KWLS), a directory of all our agents and offices, the latest press on Keller Williams, as well as information on home buying and selling. Login as an Associate to access your profit sharing information, access vendors from the Marketing tab to buy signs, stationery, business supplies, etc., edit your profile, input your annual production goals and track your progress against them, load listings in the KWLS (Keller Williams Listing Service), create a Greensheet for Under Contract listings, edit your EagentC website, read the latest KW news and research, and access all our e-cards, marketing tools and resources.

mykw.kw.com This is your central hub for you to access all the Keller Williams websites, resources, and technology. *Login is the same as kw.com

www.kwparkcity.com (KW Park City Public Website) This is our Market Center's public website. This site displays the contact information for our associates on a rotating basis and listings broadcast through the KWLS.

www.kwparkcity.net (KS Park City WebOffice) Our local intranet where you can view the training calendar, track expenses, store your database, and much, much more.

www.kwuniversity.com KWU online is a world-class online education web site created for Keller Williams Associates. Register for classes online, download the latest free materials and tools, and much more. *Login is the same as kw.com.

support.kw.com Get answers to frequently asked questions with the offline help desk. This site has instructions on everything from setting up KW email accounts to setting up websites. This is a site to bookmark and explore.

familyreunion.kw.com Register online, get important updates on the latest Family Reunion news, find shared transportation, and reserve rooms.

www.kwconnect.com Brings online and anytime/anywhere learning tools directly to agents. From basic skills to technology and culture, KWConnect covers current topics in ready-to-use formats so agents can learn quickly and conveniently 24 hours a day. *Login is the same as kw.com

agentmountain.kw.com Gary Keller's website for bringing the Millionaire Real Estate Agent to life, with real people bringing real strategies and real tactics to real estate. Each month new videos, interviews and downloads are posted. *Login is the same as kw.com

THE COMMISSION STRUCTURE

In most traditional real estate companies, the commission structures is such that the more you earn, the more you give away. At Keller Williams Realty®, we believe that **the harder you work, the more you should be rewarded**. Keller Williams Realty has an Associate Commission Cap system, which means that after you hit your Cap, everything else you earn is yours! We also believe that all of our Associates should be offered the same commission plans and treated equally. At KW Park City Keller Williams Real Estate there are no special or individualized commission plan agreements.

There are two fees that make up the Cap, and once they are paid, 100% of your commission goes to you, the Associate.

- The Keller Williams Real Estate International (KWRI) Franchise Royalty Fee of \$3,000 per year
- The Keller Williams Park City Real Estate (KWPCRE) Associate Specific Cap Fee*
(a yearly fee established by your geographic area of real estate focus based on where 85% of dollar volume will be generated).

All KW Park City Keller Williams Real Estate Associates are on the following commission split program:

BEGINNING ON EACH ASSOCIATE'S INDIVIDUAL ANNIVERSARY DATE

- **6%** of total commission go to **KWRI Franchise Royalty Fee** (capped at \$3,000 per 12 months)
- **30%** of total commission go to the **KWPCRE Associate's Specific Cap Fee**
- **64%** of all commission goes to the **Associate**

ONCE AN ASSOCIATE HAS PAID THEIR \$3,000 KWRI FRANCHISE ROYALTY FEE:

- **30%** of total commission go to the **KWPCRE Associate's Specific Cap Fee**
- **70%** of total commission go to the **Associate**

ONCE BOTH FEES HAVE BEEN PAID, THE ASSOCIATE HAS CAPPED!:

- **100%** of all commission goes to the **Associate**

*The Associate's Market Center cap is determined by Ownership and Associate Leadership Council decision and generally based on Market Center operating expenses, economic conditions and market conditions for that specific KW Market Center. Generally the higher the operating expenses of a Keller Williams Market Center are, and the higher the values in the area the market center services, the higher the Cap will be in that market Center. The Cap for the KWRI Royalty Fee (\$3,000/year) does not fluctuate. In both cases, once an Associate reaches their Cap, the money for the balance of that Associates fiscal year is the Associate's...Keller Williams Realty works on the Associate's anniversary year, not a calendar year, so no matter when an Associate joins, the Associate has a full 12-month year to prosper. If an Associate does not reach either Cap in a year, they DO NOT have to make up the difference...the Cap is simply a max payout per anniversary year.

Note: Every KWPCRE Associate is also charged a flat fee of \$25 per transaction for Errors and Omissions Insurance. KWPCRE also offers qualified Capping Associates with proven multi-year volumes of \$10,000,000 or more, the opportunity to participate at an 80/20 split, yet still applied in the same manner as described above. If the Associate falls under the \$10,000,000 production volume level, they revert back to the 70/30 commission split plan.

REAL ESTATE GLOSSARY

ALC The Associate Leadership Council (ALC) is made up of agents from the top 20% in the market center. They serve as chairpersons of the standing committees and participate as voting members on the Associate Leadership Council which drive productivity, profitability, growth and culture in the market center.

BOLD To help real estate agents increase their profitability, KW MAPS Coaching offers BOLD: Business Objective, a Life by Design. BOLD conditions agents with powerful mindset exercises, language techniques, and lead generation activities to increase sales through the relentless pursuit of leads and business-building activities.

"CAPPER" When an agent reaches cap status of \$19,000-29,000 (depending on the Market Center) paid toward Company Dollar, he/she 'caps' and begins receiving commissions based on 100% of the earned commissions.

E&O Errors and Omissions - required, at a rate of \$25 per month, \$25 per closed transaction

FAMILY REUNION An annual KW gathering with thousands of top associates during four power-packed days of networking and training to re-energize and take your business to the next level.

GREENSHEET An agent's disbursement authorization form that must be completed with every sale in order for an agent to get paid. No paperwork is processed until it is turned into the Assistant MCA.

IGNITE The Keller Williams Ignite course has a single objective: to propel both newly licensed and experienced Keller Williams real estate agents into immediate productivity. To achieve this goal, this real estate career training course contains a wealth of fundamental and foundational real estate content, enhanced by productivity-based exercises, an online tracking system, practical job aids, and powerful real estate scripts.

KWRI Keller Williams Realty International - located in Austin, Texas, is a national headquarters of support services, not a corporate business headquarters, as one might expect.

KWLS Keller Williams Listing Service is a national database of listings, similar to realtor.com. All Listings are automatically populated from MLS to KWLS. KWLS feeds the KW agent websites.

MEGA-AGENTS An agents who produces in excess of \$6M-\$10M in GCI annually, receives national recognition, is eligible to participate in national coaching and training.

PROFIT SHARE A passive income stream to build wealth and long-term retirement benefits available to associates who help the Market Center grow.

ROYALTY FEE A franchise fee that all KW agents pay out of every sale until they "cap" at \$3,000 per anniversary year. This is deducted from agent's commission.

MEGACAMP Hosted by KW MAPS Coaching, Mega Camp is the hub where top-producing real estate professionals unite to network with the industry's most esteemed leaders.

UVP Unique Value Proposition - every agent needs to develop a personal UVP

8x8 and 33-TOUCH Marketing Campaigns in eEdge directed towards "Have Mets"

12-DIRECT Marketing Campaigns in eEdge directed towards "Have Not Mets"

AGENT FEES

Not only are the agent fees at Keller Williams some of the lowest in the real estate industry, but our agent career training, education, technology and support IS THE BEST in the real estate industry! If you want to build a successful real estate business in a continually shifting real estate market, you should be concerned about who is going to train, educate and support you, so that you can provide value to your customers and take your real estate business to the highest level...and NET the most money!

DESK FEES

Instead of charging mandatory desk fees, we would prefer that our real estate agents have the option to choose where to invest their own money. In the Keller Williams Park City office, unused workstations and day desks can be used for free as well as the computers in the resource center. The majority of our Keller Williams Realtors work from home, and come into the office for the training, education, support, conference rooms and technology. When your real estate business gets to a point where you feel comfortable investing in an office space, that office space is offered to our agents at revenue-neutral market center cost.

MONTHLY FEES

The average Keller Williams agent monthly fees range from about \$75-\$110/month, based on the economic conditions of the KW market center. For example, if a Keller Williams Realty office is in a higher end market/location, their rent and expenses would be higher, and their agents would spend a little more a month to operate their real estate business out of that office. For this monthly fee, you not only get access to the real estate industry's best realtor career training, education & support, but Keller Williams associate's fees also include Errors & Omissions insurance & access to the real estate industry's first and only lead to close platform for real estate agents: KW eEDGE(agent website, contact management & marketing).

Also keep in mind that at Keller Williams Realty we use our profit sharing program and our agent leadership counsel in order to treat our real estate associates as shareholders. As shareholders in our company, our real estate agents do not just share in the profits of their office, they are actually the ones who are making many of the decisions in the office. Our agents make decisions that determine what new training, support and technology are needed by their office in order to be more productive and successful. Keller Williams Realty is the only open book real estate company in the industry, so there are also NO HIDDEN FEES! All associated fees with Keller Williams Realty are fully disclosed to our KW agents from day one. Dollar for dollar we have the best value proposition for agents in Real Estate. It is this unique interdependent real estate model, that has propelled Keller Williams Realty to the top of the real estate industry in less than 30 years!

OTHER AGENT COSTS

Just like most real estate companies, our Keller Williams agents are independent contractors and pay all of their basic expenses for their real estate business, including, but not limited to: business cards, open house signs, advertising and marketing, sign riders, name badges, etc. KW has negotiated competitive discounted rates with local advertising sources and national vendors to help our Keller Williams associates maximize their budget.

Remember, often times the cheapest option has the most expensive consequences and 100% of \$0 is still \$0. While other real estate companies will tell you they will give you stuff for free, they can well afford it from the profits they are making off your production! Just keep in mind that there is a reason that they can provide these items, and YOU are paying for it!! If you are really serious about running a successful real estate business versus looking for a 'job' in real estate, you will not find a better real estate company that will provide you with the best real estate agent training, support, technology and culture, so that you can take your real estate business to the highest level, and net the most money. !! Our mission at Keller Williams Realty, is to help our agents have a real estate career worth having, a real estate business worth running and a life worth living!

MARKETING YOURSELF & YOUR LISTINGS

Marketing yourself or a new property listing takes a multi-pronged approach. Kate Spears, with Halcyon Graphic Design, works in our office and offers design services for agents and their listings:

- AGENT BRANDING
- FOR SALE SIGN
- PROPERTY FLYERS & BROCHURES
- JUST LISTED POSTCARD MAILERS
- OPEN HOUSE POSTCARD MAILERS OR DOOR HANGERS
- ADVERTISEMENTS FOR PRINT PUBLICATIONS
- EMAIL MARKETING PIECES
- CUSTOM WEBSITES FOR YOUR LISTING





We offer a full spectrum of design services to better market yourself to current and potential clients, from branding to mailers and email marketing all the way to website design and social media.

MARKETING PRICING

DESIGN FEES

BUSINESS CARDS (from template)	\$20
BUSINESS CARDS (custom)	\$45
FOR SALE/OPEN HOUSE SIGN (from template)	\$20
FOR SALE SIGN (custom)	\$45
PROPERTY FLYER (8.5" x 11")	\$45
PROPERTY BROCHURE (11" X 17" foldover)	\$100
POSTCARDS (8.5" x 5.5")	\$45-55
CUSTOM MAILCHIMP CAMPAIGN	\$100

Design Fees for additional services can be provided upon request.

SIGNAGE & PRINTING COSTS

SIGNAGE PRICING

18" x 24" for sale or open house sign print	\$45
sidewalk a-frame	\$33
for sale sign installation	\$45
green flyer with installation	\$52
brochure box installation	\$12
4' x 8' single-sided sign	\$315
4' x 8' sign installation	\$155

PRINT PRICING

8.5" x 11" double-sided flyers	\$0.75 per print
11"x 17" fold-over brochure	\$1.25 per print
8.5" x 5.5" handout postcard	\$0.50 per postcard
8.5" x 5.5" mailer postcard with postage	\$0.85 per postcard
500 business cards	\$30