



Open House ***Playbook***

kw *Where Entrepreneurs Thrive*®

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Welcome to the Open House Playbook!

The first open house was held in 1910. Since then, real estate agents all over the world have continued to host them as a way to sell their listings and meet future buyers and sellers. According to the 2021 Home Buyers and Sellers Generational Sellers Report authored by the National Association of Realtors®, 53% of all home buyers sourced information about a property at an open house.

Due to the low cost, hosting an open house can provide you with one of the highest returns on investment compared to all real estate lead generation.

This playbook is designed to provide you with the model on how to run the most effective open house as well as walk you through the system step by step. Together we are about to create a very powerful open house event that will put you in a position to maximize your time and exposure for the listing you are holding open.

Open Houses Mythunderstandings

1. Buyers who come to open houses are not ready to buy.

Reality: Almost everyone who comes to an open house will transact. Some are NOW buyers, others could be your future business if you nurture that lead.

2. Everyone just looks at houses online so open houses are a waste of time.

Reality: According to NAR ® between 2021 and 2022, 41% of buyers reported using open houses as a source of information and 28% of buyers reported using open houses frequently to occasionally for information during their home search.

3. Buyers who come to open houses already have an agent.

Reality: On average buyers searched for homes for three weeks before contacting an agent. For some buyers, their first step in the home buying process is attending an open house not contacting an agent, which is your opportunity to become their agent.

4. Open houses only work if you do them on the weekend.

Reality: The right day and time for an open house can vary. An open house for a listing in a retirement community with a golf course may get better traffic on a weekday 4-6 hours after the first tee time than it will on a weekend. An evening open house during the week may be perfect in an area where many employers require weekend shifts. There is no one day or time that is universal for open houses, choose what is right for your market and the specific listing.

5. The main reason to have an open house is to sell that listing.

Reality: Open houses are a lead generation tool. Well-executed prospecting and marketing for an open house will bring in buyer leads and attract neighbors who become curious about selling.

Open Houses Mythunderstandings

6. Open houses only attract curiosity seekers and neighbors.

Reality: Open houses attract several groups of people:

1. First-time homebuyers who are trying to figure out what they are looking for in a home and/or neighborhood.
2. Other agents who want to see if a home meets the criteria of current clients
3. Neighbors who could become future listings when they see the possibility of selling their home at a similar price to the open house listing.
4. “Lookie-Loos” may feel like a waste of time, but remember most curiosity seekers eventually transact real estate with some agent and that agent could be you.

7. I’m only doing lead generation on weekends if I spend my time hosting open houses.

Reality: A successful prospecting and marketing strategy for an open house begins well before the weekend and, done right, is lead generation for your business generally, not just for the specific listing.

8. I don’t need to do an open house if I do a broker open OR I don’t need to do a broker open if I do a public open house.

Reality: Hold a broker open before your public open house to help limit the number of agents attending your public open house so you can focus your attention during the public open house on potential buyers while also getting the word out about your listing to agents who have clients actively looking to buy.

Open Houses

Step 1. Pick the Right House

1. Hold Open Your Own Listings
2. New-to-Market Homes
3. Low-Inventory Neighborhoods

Step 2. Create Marketing Materials

1. Flyers
2. Registration Sheet
3. Score Cards

Step 3. Market the Open House

1. Invite your Database
2. Invite the Neighbors
3. Post to Social Media

Step 4. Get Ready to Host

1. Set Out Signs
2. Arrive Early

Step 5. Follow Up

1. Follow Up Tips

1. Pick the Right House

Although any listing can be held open, choosing a property that puts you in the best position to meet the most motivated buyers is a great first step. Below are some filters that you can use to put yourself in the right place, at the right time, more often.

Hold Open Your Own Listings

Many sellers love the idea of having an open house. There is no one better to speak about the home to a prospective buyer than the listing agent. This will help you best position the property as you will be the first to receive feedback. This is also an opportunity to meet prospective buyers that can become future clients and hopefully sell your listing!

Don't have your own listings? Reach out to agents in your Market Center about hosting an open house at one of their listings.

New-to-Market Homes

Look for properties that have been on the market 0-14 days. Many homes will have their highest per-day traffic during their first few weeks on the market. This is largely because in every price range there is a segment of buyers that have seen all of the available inventory and are eager to see new listings quickly.

Low-Inventory Neighborhoods

These are neighborhoods that do not have a lot of homes for sale. Due to the low inventory, buyers are more likely to want to see homes in those neighborhoods as soon as they are listed. You can use your MLS to search neighborhoods that have lower-than-average inventory.

Mid-Range-Priced Homes

Mid-range-priced homes have the most people looking at them. Since they are affordable to most, they are often more desirable. You can use the MLS to identify and search for average-priced homes.

Choose the Best Day and Time

Best practices for Open houses are:

1. Monday-Friday 5-7PM - this allows you to catch people coming home from work.
2. Saturday-Sunday 11-1PM and/or 2-4PM - there are benefits to morning or afternoon times.

Optimize the weekends and host multiple open houses to capture the most buyers! You can hold the same listing open multiple times or hold multiple listings open one time.

You will want to have your ideal listing picked by Monday or Tuesday.

2. Create Marketing Materials

There are a few staples to every successful open house. The first is eye-catching and informational flyers that people can take with them. The second is a digital or paper registration sheet where you can capture the attendees' contact information. Lastly, score cards to collect feedback.

Flyers

There are two purposes to flyers. The first is to use them when inviting people to your open house and the second is to have them at the open house so people can take them with them.

Every flyer should contain the following information:

1. Photos of the home
2. Key details about the home and neighborhood
3. Your contact information
4. Your preferred lender's contact information
5. A call-to-action

A call-to-action could be something like "Ask Me About My Price Reduction List" or "Ask Me About Below Market Financing" or "Get the Value of My Current Home". These entice attendees to keep in conversation with you.

Having your preferred lender's contact information on your flyer allows you to use it when talking to a potential buyer that hasn't been pre-approved yet. You're immediately showing value and the buyer is more likely to keep the flyer... that also has your contact information on it!

The Real Estate Settlement Procedures Act (RESPA) was enacted to ensure that consumers are provided with full information on the nature and costs of the settlement process and are protected from kickbacks or referral fees that tend to unnecessarily increase the costs of certain settlement services in real estate transactions. You must comply with all regulations related to disclosure and referral issues. Consult with your local RESPA counsel on any affiliated business transactions and joint marketing with settlement service providers, such as lenders.

Registration Sheet

Capturing contact information is vital to a successful open house because without it there isn't anyone to follow up with. This may include their name, email, phone number, and Buyer's Wish List. This way you can easily set them up on a follow up plan. Not everyone will be "now" buyers, but that's why the follow up is always the most important piece to lead generation. You can capture their information in two ways:

1. **Paper Registration Sheet:** This is simply a sheet of paper that people sign-in on. Contacts will be manually entered into your database.
2. **Digital Landing Page:** By building a custom landing page in Command, contacts are automatically added to your database when they sign in. This allows for easy follow up.

It's advised to obtain consent from each attendee to contact them, using language such as:

I would like _____ [agent/market center] to contact me about property listings and real estate offers and services at the telephone number and email address I provided, including communications using automated telephone dialling equipment, text messages, emails and/or artificial or pre-recorded voice messages. I understand that my consent is not required to purchase products or services.

Score Cards

Score Cards are a fun and unique way to engage guests at an open house.

When you do this right, you will have captured contact information and feedback in one place. You can collect feedback on the house by creating a simple rating system or asking questions:

1. What do you think about the price? Too low, too high, just right?
2. Rate the location 1-5
3. Rate the curb appeal 1-5
4. What were your favorite features?

Now that you have the materials you need, you can start marketing the open house to generate traffic!

Marketing materials should be created by the end of day Wednesday so you can start marketing the Open house.

Reference Tech Play [#8](#), [#15](#), [#16](#), and [#17](#) to learn more about how you can use technology in this section.

Example Flyer

OPEN HOUSE

Sunday, April 28
From 11 a.m. - 2 p.m.

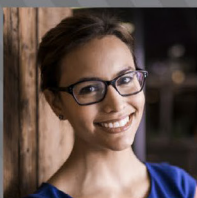
1424 Barrington Oaks Blvd. Boston, MA 02134
 3 bedrooms | 2 bathrooms | 2,200 sq. ft. | Built in 2015

LISTED AT \$450,000

SEE IT FOR YOURSELF!

This spacious and welcoming home in the pastoral South Hills neighborhood is waiting for you. Nestled among the oak trees, 1424 Barrington Oaks is an outdoor lover's dream. Swim laps in the elegant and well-maintained pool or stroll through the adjacent gardens. All that's missing is you.

Contact me to RSVP or to schedule a private tour.



AGENT NAME

contact details
 website
 email/social media info

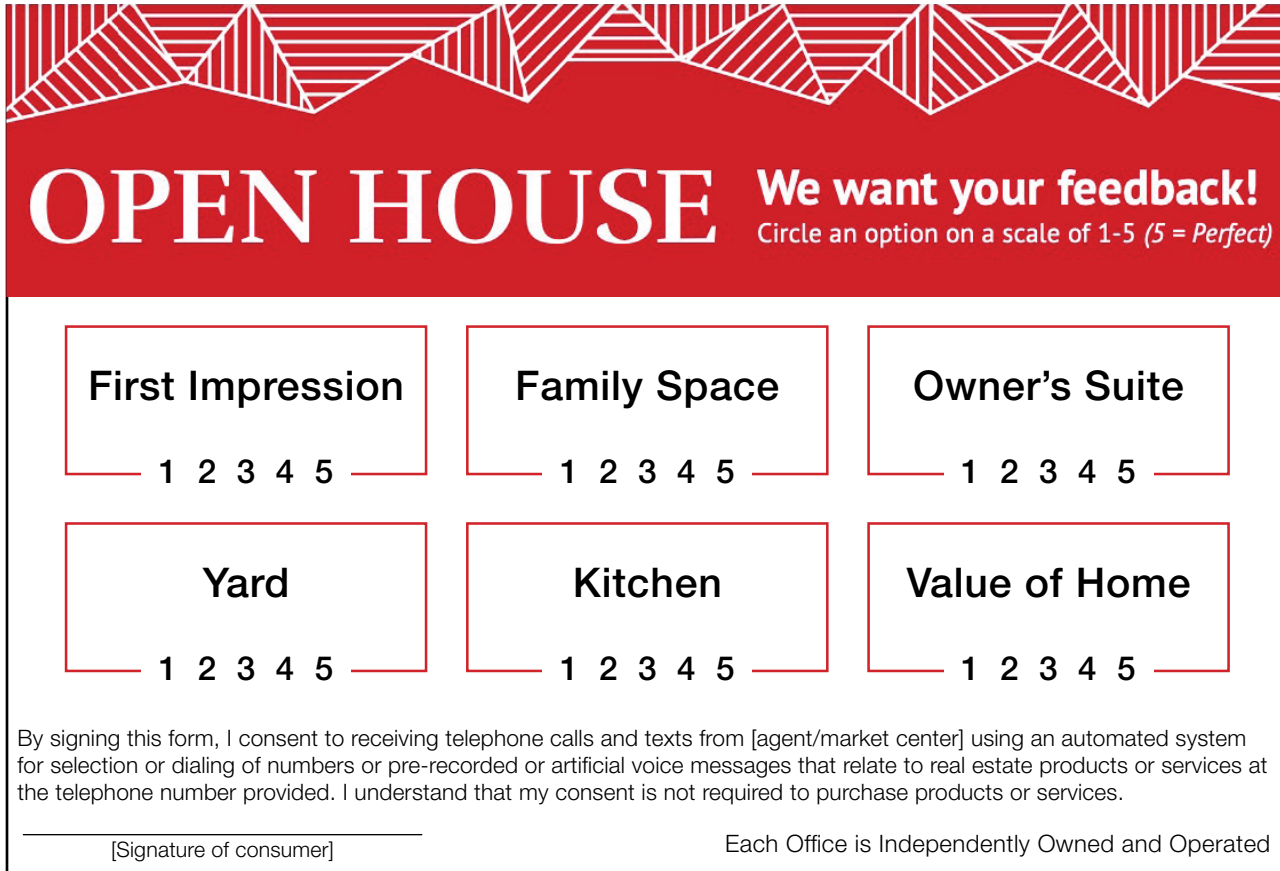
Download my app!
app.kw.com/xxxxxx

kw DBA NAME
 KELLERWILLIAMS

Each Office Is Independently Owned and Operated



Example Score Card



OPEN HOUSE **We want your feedback!**
Circle an option on a scale of 1-5 (5 = Perfect)

First Impression _____ 1 2 3 4 5 _____	Family Space _____ 1 2 3 4 5 _____	Owner's Suite _____ 1 2 3 4 5 _____
Yard _____ 1 2 3 4 5 _____	Kitchen _____ 1 2 3 4 5 _____	Value of Home _____ 1 2 3 4 5 _____

By signing this form, I consent to receiving telephone calls and texts from [agent/market center] using an automated system for selection or dialing of numbers or pre-recorded or artificial voice messages that relate to real estate products or services at the telephone number provided. I understand that my consent is not required to purchase products or services.

[Signature of consumer]

Each Office is Independently Owned and Operated

Name: _____

Email: _____

Phone: _____

I would purchase this home priced at \$ _____

Are you working with an agent?
Yes | No

Property Listed by
[Agent Name]
[Phone] | [Email]



3. Market the Open House

The key to a successful open house is generating as much traffic as possible. Marketing the open house a few days before the event allows you to notify people in advance to mark their calendars!

Invite Your Database

Inviting your database allows you to touch your database and provide them value at the same time. You should invite first via email. When you send them the flyer you've created, you're showing buyers a property they could be interested in and sellers the value you provide to listings. The following day you can call or text your database about the open house in a TCPA-compliant way. This is a great opportunity to have a conversation with your database and check in.

Invite the Neighbors

Door knock and circle prospect the neighborhood a day or two before the open house. The purpose is to invite neighbors to come 30 minutes early for a sneak peak of the home you are holding open. Inviting the neighbors allows them to satisfy their curiosity and also provides them the opportunity to think about selling their own house. When they visit, you can offer to provide them information about their house that would allow you to enter them into your database. This is a great time to ask for a referral!

1. Door knock the nearest 20 homes (10 one side of the street and 10 on the other side).
2. Circle prospect the neighborhood or immediate area.

CONVERSATION - Door Knocking and Circle Prospecting

Hi! My name is _____ with (Market Center or team 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.

NO

That's okay...there is still time (make a joke). While I have you ("on the phone" if calling), would you like me to get 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.

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Post to Social Media

Posting to social media is another easy way to ensure you get the most traffic possible to your open house. This also makes you more visible to your friends and family as their real estate agent of choice. Easily use Designs in Command to create a graphic to advertise the open house.

Include the following:

1. Day(s) and time(s)
2. Address
3. Key details of the home (square footage, # of bedrooms and bathrooms, any unique features)
4. A call-to-action

A call-to-action here might be something like “Click to Get a Sneak Peak” where it takes them to a quick video tour of the property.

Another way to generate traffic on social media is to use the same graphic you created to post an ad on Facebook or Instagram. This will allow you to reach buyers that don't follow you and capture information of new potential buyers.

Pro Tip: Use your preferred vendors, like a Title Company, to help get a list of the neighbors to contact on social media.

You should start marketing the open house on Thursday.

Reference Tech Play [#19](#) and [#20](#) to learn more about how you can use technology in this section.

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Example Social Post

New Listing & Open House !!

-ONLY home available in the highly desirable Reserve at Southpark Meadows! RARE oversized corner lot backs to greenbelt, on a cul-de-sac and only one neighbor! Open concept floor plan. Spacious master bedroom w/ separate tub & shower, wood burning fire place, and covered balcony. High end kitchen features SS appliances, granite countertops and lots of natural light! HUGE backyard w/ covered patio and an upstairs balcony! Low traffic due to street with 2 cul-de-sacs. | \$379,500 | OH 6/12 3pm - 6pm 🏠

📧 - info@gunnrealestate.com @ Austin, Texas

NEW LISTING

9420 BENTLEY GARNER LN, 78748

4 BEDS | 3 BATHS

+/- 2,138 SQ.FT.






4. Get Ready to Host

You created all the materials you need and invited everyone you can. Now it's time to host an amazing event.

Set Out Signs

This is important!

Signage is the last key step to getting as much traffic as possible to your open house.

1. It's suggested to put out 20-40 signs per open house.
2. Put signs at all directional stops, major intersections, entrances to the neighborhood, and several throughout the neighborhood. You want to capture as many people driving by as possible. Don't forget to put a sign in the front yard so people know which house you're holding open!
3. Start the night before. If you have an open house early in the morning, putting signs out the night before will maximize the amount of people seeing signs before the morning.

**Follow all local solicitation and sign ordinances, as well as all local ordinances, Homeowner Association Rules, or similar when door knocking.*

Arrive Early

If you've invited the neighbors for a sneak-peek preview, you should be there early to greet them. This is a great opportunity to talk with neighbors one-on-one about the neighborhood traffic, the market, and ask for a referral. You can mention the Monthly Neighborhood Nurtures and ask if this is something they'd be interested in receiving from you.

Before the open house starts you can take 1-2 quick videos of the neighborhood or key features of the house to post on social media. This is just another marketing push for visitors!

Host

This is it! People are coming in and out, you're introducing yourself and asking them to sign in, and you're having conversations about the details of the home. Your hard work is paying off.

CONVERSATION - Introduction

Hi there, welcome to 123 Main Street. What brings you by today?

I'm just looking.

We typically find that people come to open houses either to look for a home of their own or find the value of their house. Do you live near here?

5. Follow Up

Like all lead generation in real estate, the money is in the follow up! Following up with people that attend gets you one step closer to an appointment.

Follow Up Tips

1. If attendees were not automatically added to your database through your registration sheet, **add them and make notes** on which open house they attended.
2. **Contact everyone that attended** the open house as soon as possible. This is your opportunity to note the neighbors, the looky-loos, and the interested buyers to determine what follow up plans you should use.
3. **The following Monday**, call the same people you called when you were circle prospecting the neighborhood before the open house to provide feedback, offer a market analysis, and ask for a referral. Any calls must be made in a TCPA-compliant way.
4. **Add follow up plans** to every new contact.

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CONVERSATION - Monday Circle Prospecting Follow Up

Hi there. This is _____ with (Market Center or Team 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

If the open house was a success.

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

Okay, have you seen anyone in the neighborhood that maybe has a pod in front of their home?

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 four pieces of info).

OR

Okay, have you seen anyone in the neighborhood that maybe has a pod in front of their home?

YES

Awesome, can you tell me where the home was located? I'd love to see if I they are moving and I could matchmake one of the families from the open house with those sellers.

OR

Well, have you considered selling your home?

YES

CLOSE FOR THE APPOINTMENT

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CONVERSATION - Monday Circle Prospecting Follow Up

If the open house was not a success.

Hi there. This is _____ with (Market Center or Team 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?

FOLLOW ABOVE CONVERSATION FROM HERE

Reference Tech Play [#21](#) and [#22](#) to learn more about how you can use technology in this section.

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Congratulations!

Congratulations! At this point you have selected the right property to hold open, marketed your open house to attract visitors, met the neighbors, put out signs, had a successful event, and set up follow up plans.

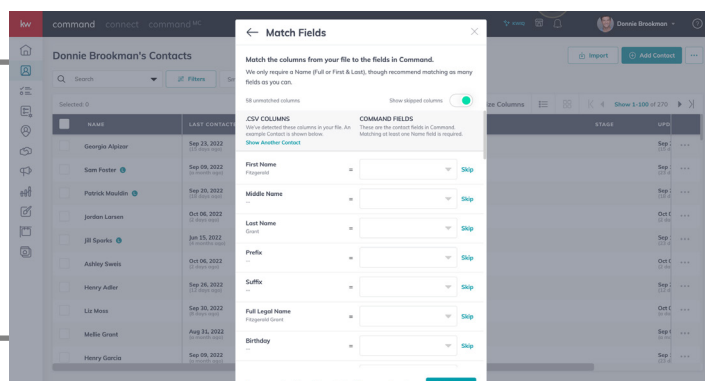
#8 LEAD CAPTURE

Leads can be added to KW Command manually, file import, from another CRM/Technology provider through API Nation, or captured from the associated consumer experience. You should have proper consent to call/text any phone numbers you add and/or scrub the numbers against the Federal Do Not Call Registry and your internal Do Not Call list.



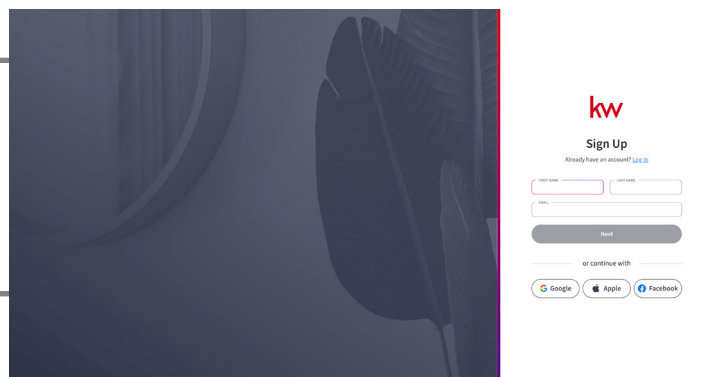
CONTACT IMPORT

1. Open Command > Contacts
2. Select "Import"
3. Download template or upload a custom file
4. Map fields
5. Continue to Import



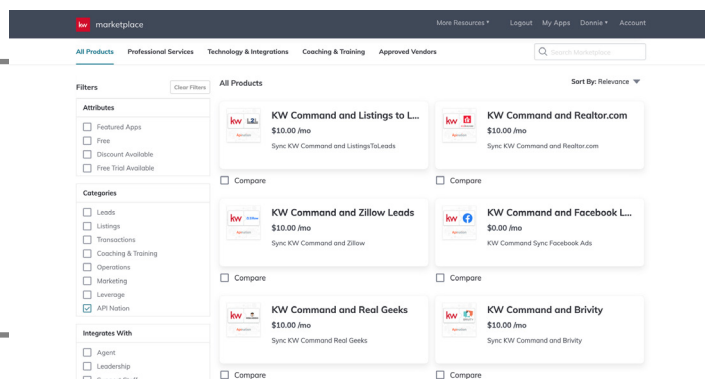
CONSUMER LEAD CAPTURE

Leads captured from KW agent sites & mobile app will be mapped to Command > Contacts. Command's Campaigns applet also has social ad lead capture forms built in.



API NATION [MARKETPLACE]

API Nation can be purchased in the Marketplace to bidirectionally sync contacts between Command and 22 popular systems. Options range from Google, iCloud (Apple), Realtor.com, Zillow, and more.



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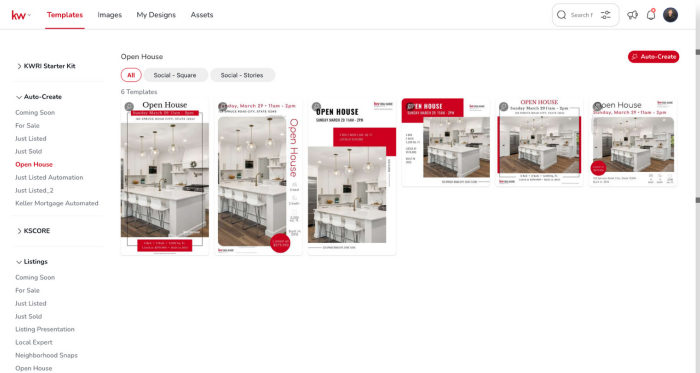
#15 **CREATE MARKETING MATERIAL**

Command's Designs applet allows agents to customize hundreds of social or print design templates. Preferred materials, DBA logo, headshot, & team images can be saved as custom assets. Select collections offer design automation. Choose open house collection, select listing, provide open house details, confirm agent info, and create six different templates automatically.



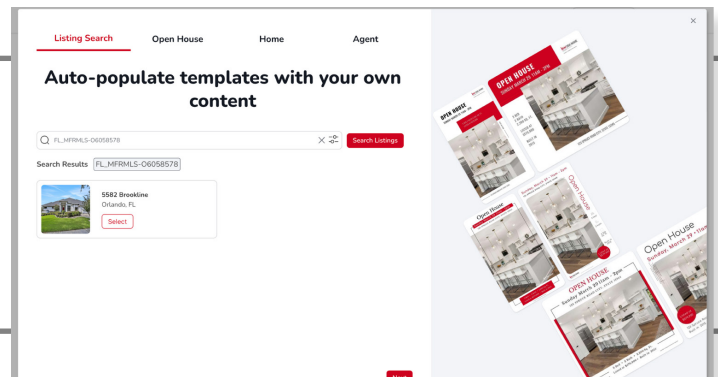
SELECT AUTOMATED COLLECTION

1. Browse automated collections on left menu
2. Choose "Auto-Create"



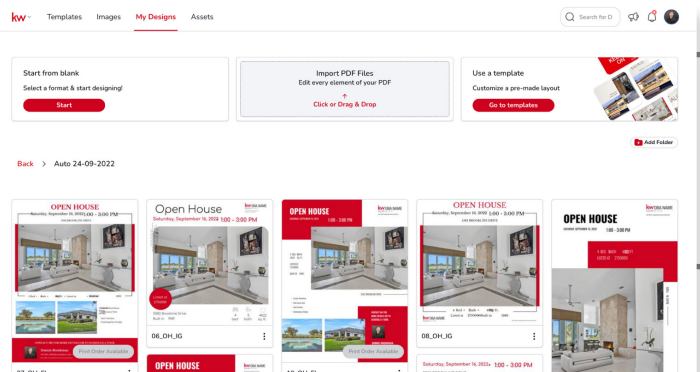
CONFIRM DETAILS

1. Search for Listing
2. Confirm Open House details
3. Confirm property details
 - a. Brought in from MLS
4. Confirm Agent info



VIEW COMPLETED DESIGNS

1. All templates from collection will be added to folder
2. View, download, or save any template desired



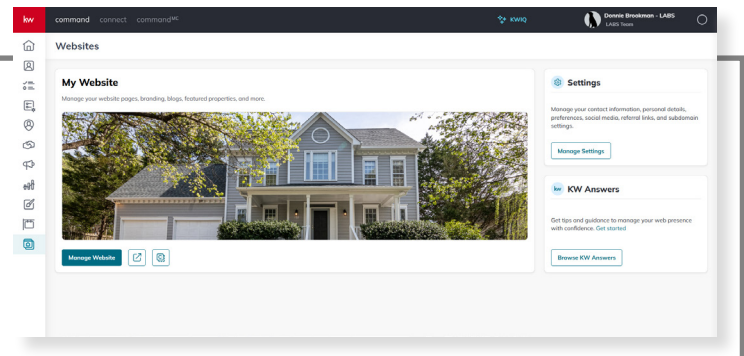
#16 **CREATE SQUEEZE PAGES** (FORCED REGISTRATION)

Agents can set required registration settings for their agent site based on the number of properties a consumer views. Options range from unrestricted to no property viewing. Visitors will be prompted to register or sign-in after hitting the property view limit set by the agent. Individual landing pages can be created through Command's Consumer applet with a variety of widgets.



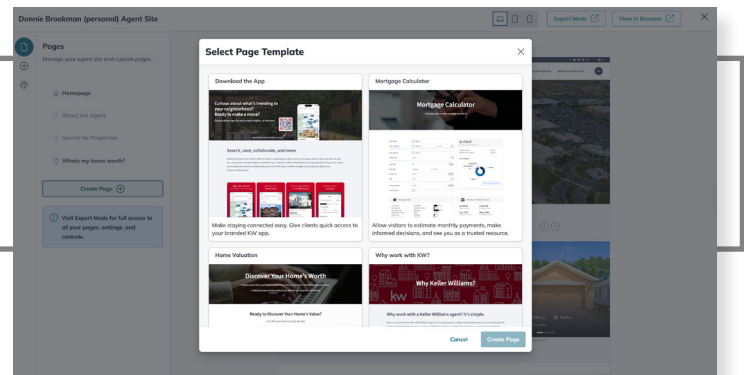
SET REGISTRATION SETTINGS

1. Open Command > Consumer
2. Select "Site & App Settings"
3. Select desired property limit
 - a. Unrestricted, 10 properties, 2 properties, or no properties
4. Save settings



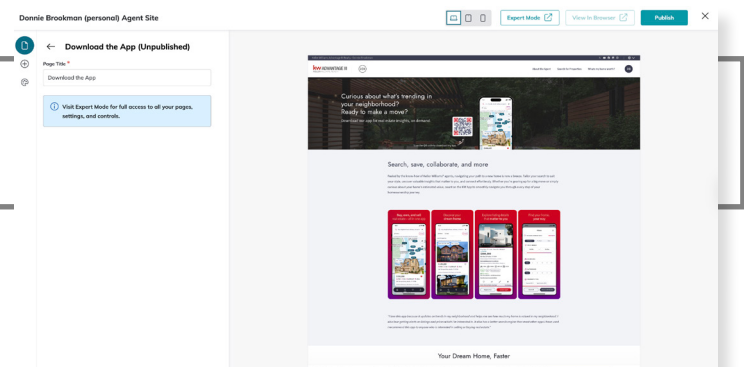
CREATE A LANDING PAGE

1. Click on "Manage Website"
2. Click on "Create Page"
3. Select from one of the page templates



CUSTOMIZE PAGE

1. Confirm page title
2. Select "Publish" in top right corner





1. Campaigns > Social Posts
2. Browse “Quick Posts” and use share button
3. Choose to publish immediately or schedule post



1. Campaigns > Email
2. Create Campaign > Email
3. Browse 70+ ready to use templates



1. Designs > Create Design > Print
2. Lead Generation category > I ❤️ KW



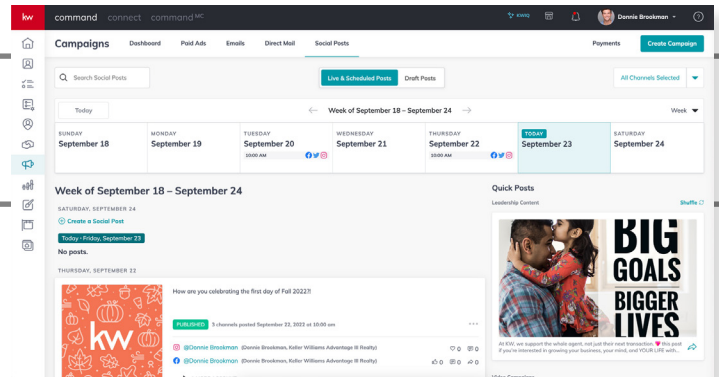
#19 POST TO SOCIAL MEDIA FREE

Create and manage organic reach social media posts through Facebook, Twitter, or Instagram. Media can be uploaded directly from the agents computer or pulled from Designs. Agent's can share ready-to-go "Quick Posts" directly to social platforms with no required editing.



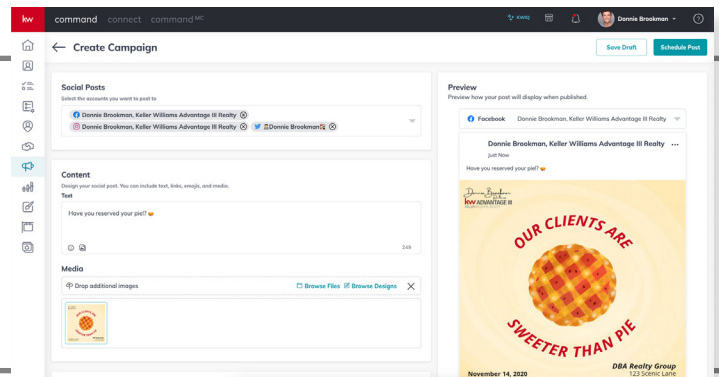
CREATE A SOCIAL POST

1. Click Create Campaign
2. Select Social Post



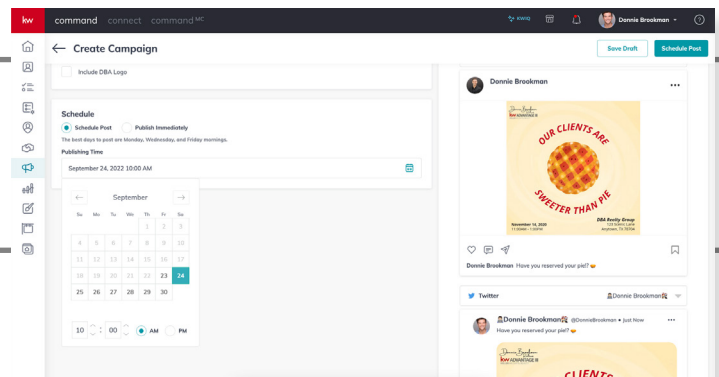
CUSTOMIZE POST

1. Choose Social Channel(s)
2. Write Text
3. Add Media
 - a. Upload from computer
 - b. Browse from Designs
4. Preview posts by Social Channel



SCHEDULE POST

1. Schedule post by date/time
2. OR Publish immediately
3. Confirm selection



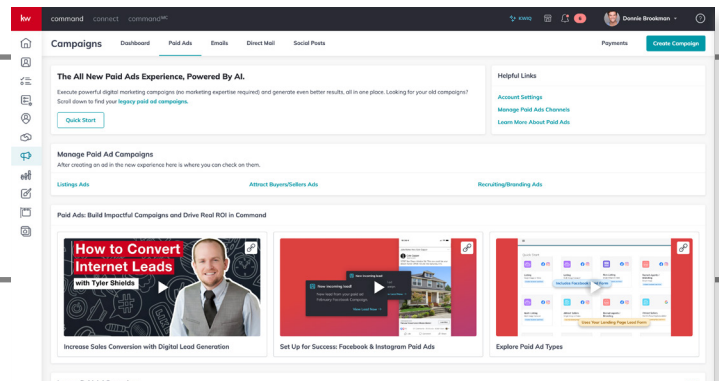
#20 RUN PAID SOCIAL MEDIA ADS

Agents can run paid ads through Command on Facebook, Instagram, and Google. Campaigns creates an easy button for agents to build a variety of ad types to both create awareness of their brand and generate new leads directly in their Contacts database. Lead settings allow the agent to tag and trigger SmartPlans to bring immediate follow-up automatically. Agents can choose listings to advertise and leverage AI to create ad copy easily. You should have proper consent to call/text any phone numbers you add and/or scrub the numbers against the Federal Do Not Call Registry and your internal Do Not Call list.



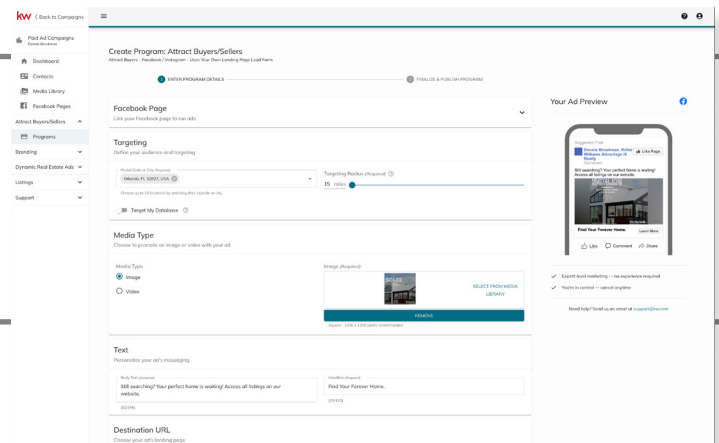
CREATE PAID AD

1. Navigate to Command > Campaigns
2. Select "Paid Ads" tab
3. Choose "Create Campaign" and select Paid Ad



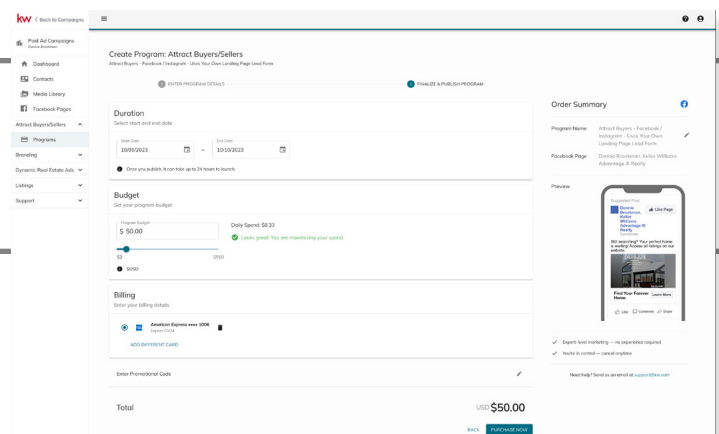
SELECT YOUR AD TYPE

1. Choose Ad Type
2. Select Listing (for listing ad types)
3. Customize targeting, media, and text (Option: Use AI to autogenerate text)
4. Proceed to the last step



LAUNCH YOUR AD

1. Review ad duration
2. Set ad budget
3. Confirm details and launch ad



Any text or materials generated by artificial intelligence (AI) should be reviewed for accuracy and reliability as there may be errors, omissions, or inaccuracies. The use of generative AI is subject to limitations, including the availability and quality of the training data used to train the AI model used. Users should exercise caution and independently verify any information or output generated by the AI system utilized and should apply their own judgment and critical thinking when interpreting and utilizing the outputs of generative AI.

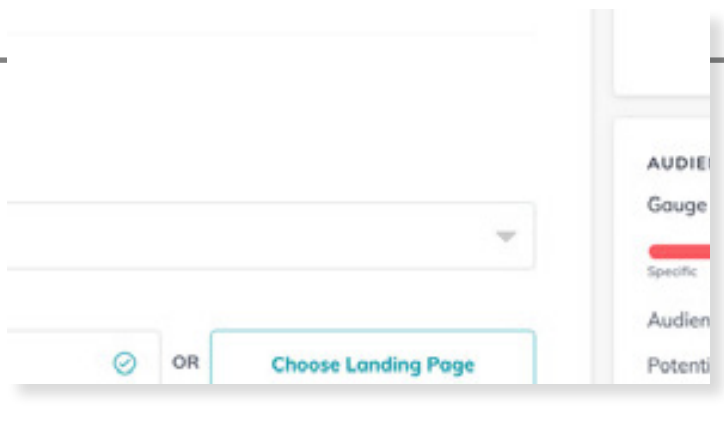
#20 ***RUN PAID SOCIAL MEDIA ADS (CONT.)***

Agents can run social media ads through Command on Facebook, Instagram, Twitter, and Google. Campaigns > Social Ads provides a dashboard to monitor ads and track leads. Leads captured are added to Contacts. Lead settings allow for auto-tagging & triggering SmartPlans. Listings are connected to bring in description and media from MLS.



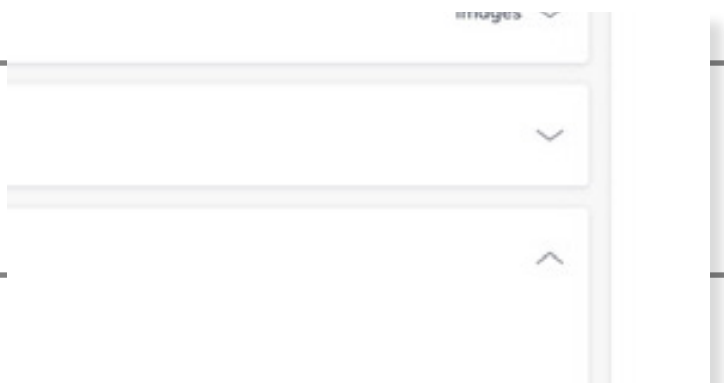
SOCIAL SETTINGS

1. Confirm Social Pages
2. Select Destination
 - a. Lead Capture Form - bring lead into Contacts
 - b. Site/Landing Page - redirect to external source
 - c. Audience
 - a. Auto, Custom, or Saved



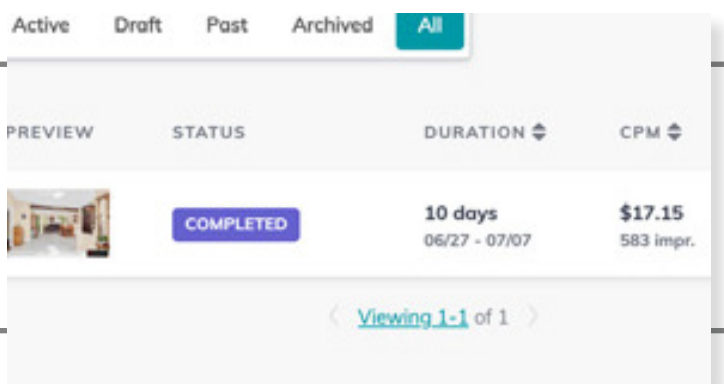
LEAD SETTINGS AND BUDGET

1. Choose contact tag(s) added to leads captured
2. Select SmartPlan(s) triggered for leads captured



MONITOR AD METRICS

1. Dashboard to monitor lead metrics and leads captured
2. Duplicate an ad
 - a. Duplicate and run
 - b. Customize and run



#21 CREATE FOLLOW-UP PLANS

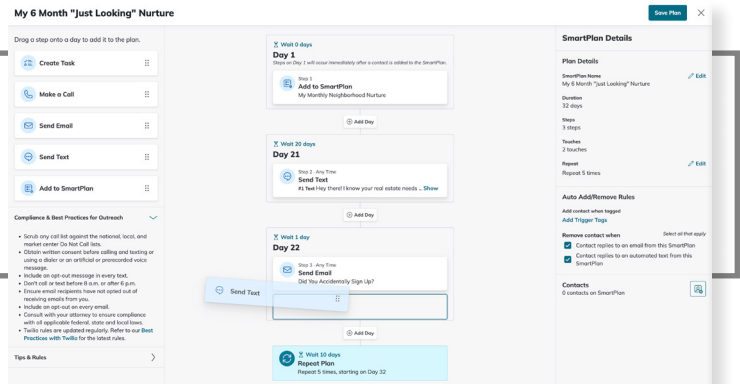
Command's SmartPlans applet provides an extensive library of follow up plans and the ability to create a custom SmartPlan from scratch. Agents can choose to publish custom SmartPlans for all associates to access a copy. SmartPlan steps can be separated with time delays (days), be set to repeat, or trigger another SmartPlan. Custom tag triggers can be added to automate the activation of a SmartPlan. Stop calling/texting anyone who asks you to stop contacting them.



CREATE A SMARTPLAN

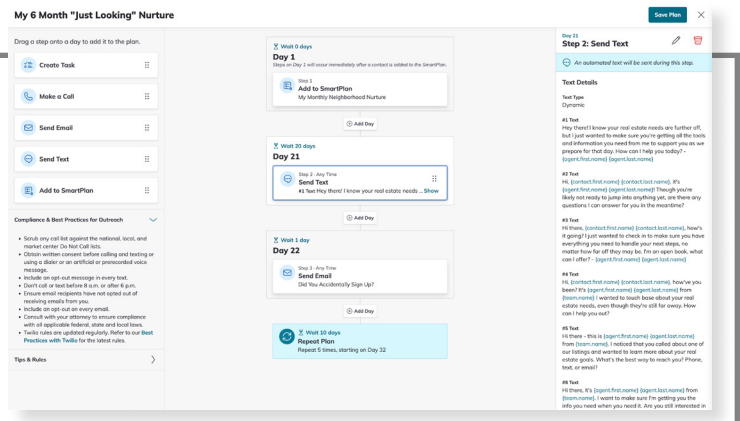
1. Open SmartPlans and choose "Create"
2. Add steps from the left to customize plan

**Teams can also designate an assignee for each step - either Rainmaker or Contact assignee.*



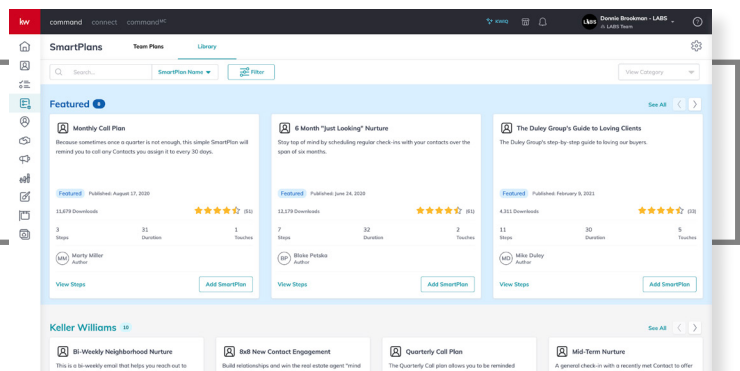
CUSTOMIZE STEPS

1. Select any SmartPlan step and customize it on the right side
 - a. Email steps: Subject line, email text, time of day
 - b. TCPA-compliant text messages: Task or automated, dynamic (multiple message for repeat steps) or static, time of day
 - c. Tasks: Date created vs. date due, time of day



BROWSE SMARTPLAN LIBRARY

1. Browse agent and KWRI created SmartPlans
2. Choose "Add SmartPlan" to download a copy to your library



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. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.

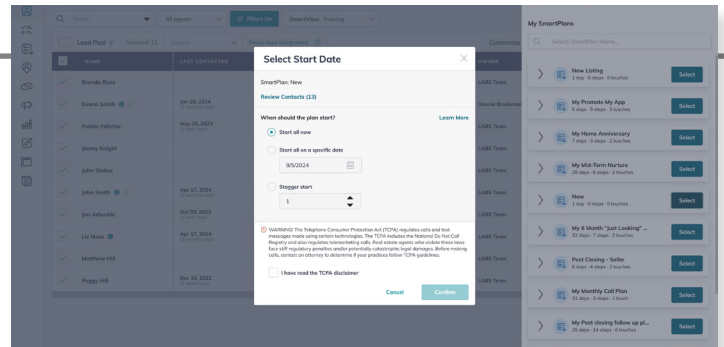
#22 USE FOLLOW-UP PLANS

SmartPlans can be applied to contact records individually and in bulk through multiple paths. Options for scheduling the start date of the SmartPlan are available. Stagger start is optional when adding contacts to a SmartPlan in bulk. Stagger start helps manage the number of daily tasks/calls. SmartPlans can be triggered by adding a contact tag and individually set from the Command App. Stop calling/texting anyone who asks you to stop contacting them.



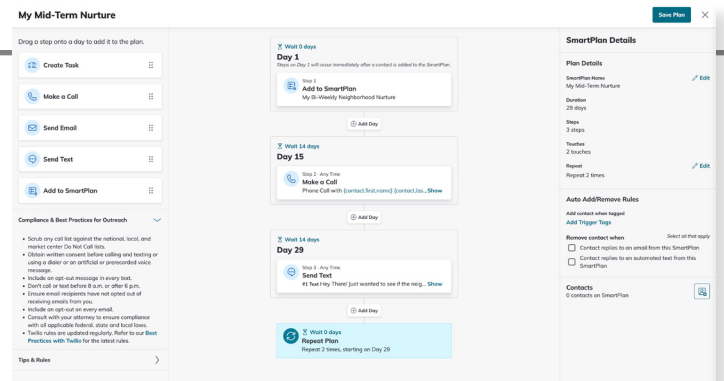
ADD TO SMARTPLAN (BULK)

1. Open Contacts and filter to desired list
2. Select contacts
3. Choose "Add to SmartPlan" from bulk action menu
4. Select SmartPlan
5. Choose Start immediately, schedule to start, or stagger start



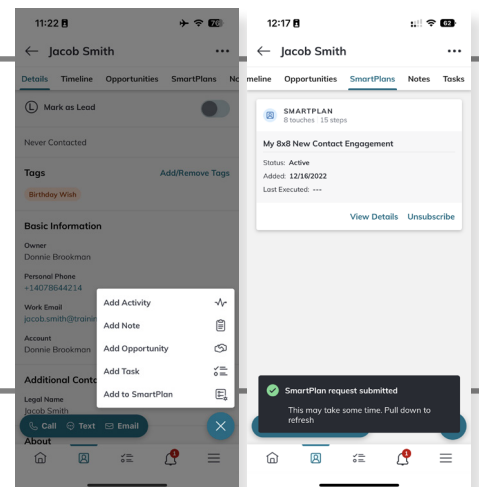
AUTO ADD/REMOVE RULES

1. Navigate to the SmartPlans applet and edit desired SmartPlan
2. Under "Auto Add/Remove Rules" on the right:
 - a. Include Contact Tags to trigger auto-starting a SmartPlan
 - b. Automatically remove contact from SmartPlan when they reply (text, email, or both)



SMARTPLANS (COMMAND APP)

1. Open contact record
 2. Select blue + button
 3. Choose "Add to SmartPlan"
- OR
1. Tap on "SmartPlans" tab
 2. Choose blue + and select SmartPlan



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. KWRI makes no warranties, either express or implied, with regard to the information and programs presented in these materials. KWRI will not accept liability for any loss or damage of any kind that you incur as a result of the use of any content provided by KWRI.