

9 Steps to Transition Your Business to Command

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Command—big picture

Command allows you to spend more time doing what you do best— having more conversations and building deeper relationships to earn more business.

Command features a suite of business applications that allow you to manage multiple aspects of your real estate business—all in one place.

- How will working with a platform built by agents for agents at no additional cost change the way you think about your technology solutions?
- What is the ONE Thing you want Command to do for you?
- What steps will you take to learn more about Command?

Adoption is a process.

If complete adoption of Command is not an option for you and your team today, consider a phased approach. You may need to run your current systems parallel with Command for a time, until full adoption of Command is complete and successful.

- How will you handle existing transactions? Will you transition them into Opportunities in Command or finish them in your existing systems?
- How will you handle new leads, contacts, and new transactions during the transition?
- Which Command applications can you adopt immediately? Which other systems can you drop? How much time and money could this save?



What is your process?

To build your systems in Command, first understand how people and deals move through your business today.

- Map your current workflow—include systems and people.
- How do leads move from Capture, to Connect, to Appointment, and to Close?
- What systems and people are part of each step?
- Review [Getting Started with Opportunities](#) help article. Will you customize the Stages within the four main Phases of Opportunities in Command? If so, how?
- What do you need to know about your contacts to make your workflows effective?

Case study

One team met to map their current business process from lead capture to close, including all of the various systems employed by different team members along the way. System limitations caused some communication gaps and redundant tasks. In some cases, multiple people were needed to shepherd the overall transaction process and manually consolidate and track all communications.

With Command, the team is now able to manage communication, tasks, and the entire business process in one place. They are able to redistribute functionary tasks, streamline the overall process, and invest more time in fiduciary tasks. Understanding and mapping their entire process was an important first step in transitioning their business to Command.



What do you want to accomplish?

If you're using a CRM along with other applications that may or may not be connected, you're not using a technology platform—you're using bolt-on technology. This can force business processes to be adapted around the systems, often resulting in inefficiencies which must be remedied with more people, processes, or applications. Ask yourself:

- Are these systems built for me or have I adjusted my business around the systems?
- What am I really trying to accomplish?
- What is truly important? Does this system bring me joy?
- Where are the limitations of my current systems? How can I accomplish the same task in Command?

Case study

Another team handled the transaction process in an online project management tool, using custom color-coding and custom stage tags to identify the current transaction phase. Due to system limitations, some tags of the same color meant different things to different team members, resulting in the need to spend more time reviewing notes for status updates.

With Opportunities in Command, the team is now able to move deals through custom stages in each phase of the transaction process. This provides an easy way to track the progress of all opportunities, streamline communication, reduce redundancy of work, and gain valuable insights into stages where transactions may tend to stall. Greater transparency into the transaction helped this team save time and track the status of deals.



Everything begins with contacts.

Contacts are the foundation of managing your business in Command. Because contact management is driven by preferences, system parameters, and business needs, consider how you're currently managing contacts and how this may change as you transition into Command.

What systems or tools do you use to manage contacts? How do these tools work together?

What are the unique or non-standard fields you capture in your current contact records for each client (KPA profile, favorite pie flavor, personal values, or hot buttons)?

How do you handle contact records for partners or spouses? Do you combine them into one record or separate them into two records that are linked together? How do you capture information about related persons (children, pets, business partners, trustees, etc.)?

Which contact record fields are most critical for sorting, categorizing, or segmenting your clients? What custom tags, groups, or identifiers do you use to understand relationships between people and target your communication?

Take action:

Examine your current contact record fields and compare them to the fields available in the Command Contact Card. Create the Custom Fields and tags in Command Settings.

Review existing contact records to identify and update non-standard records (combined partner/spouse records, records missing email addresses).



Customize Command for your business.

Command is more than a CRM—it's a platform that puts you in control of your database, your business and your future. Prepare Command to sync your contacts and support your business processes by making a few key customizations to Custom Fields, Custom Tags, and Opportunities Stages.

What applications do you need to connect in Command Settings? (Hint: See the Applications section in Settings for a list of apps you can connect.)

From the list of custom fields and tags you listed for Step 4 in this guide, which data would be best as a Custom Field in Command? Which data would be best as a Custom Tag in Command? Consider how you plan to use these Custom Fields and tags going forward.

Within Opportunities, what are the custom Stages needed for you to track progress within each of the four main transaction Phases for listings or buyers (Appointment, Active, Under Contract, Closed)?

Which Checklist Items would you want to be completed prior to the next Stage?

Take action:

Create your Marketing Profile in Command Settings.

In Settings, create any Custom Fields and Custom Tags needed to sync your contact records.

Edit and add Stages and Checklist Items to meet the needs of your business.

Choose how to bring contacts into Command.

After you have prepared Command to sync your contacts, custom fields, and custom tags, determine the best way to bring your contacts into Command.

Option #1: PieSync™

PieSync uses two-way syncing to match and synchronize customer data across 150+ connected apps.

- If your current apps are supported, PieSync can work for you.
- Set up custom rules to sync only the data you want to sync.
- Keller Williams associates receive preferred pricing with PieSync.

Option #2: Import

Command also allows data to be imported via CSV files.

- If your current CRM allows an export of your contacts via CSV, they can be imported into Command.
- Prior to importing the CSV file, be sure to clean up the CSV data, and make sure Command has been customized to sync each custom field and custom tag you may be using.

Take action:

Learn more about [connecting your apps to Command using PieSync](#).

Research the export options within your current CRM to determine the best option for you.

Connect your applications and transfer your contacts into Command.



Launch neighborhood lead generation.

Use Command to zero in on the neighborhoods you serve, provide information that your clients want, and own the conversation. Get started:

In Command Settings, select the neighborhoods you serve. In Contacts, add neighborhoods to your contacts.

Use Kelle or Command to add Local Insights for the neighborhoods you serve.

Select the basic Market Neighborhood Snapshot template to use for Email Campaigns and Landing Pages.

Customize web templates in Landing Pages by adding your own branding or contact information.

In Command Settings, associate your neighborhood Landing Pages with the neighborhoods you serve.

Add contacts to the Monthly Neighborhood Nurture SmartPlan.



Enter your pipeline.

After customizing your Stages in Opportunities, create your pipeline in Command.

Because everything is in one spot, you'll know exactly where each deal stands, be able to see how and when your revenue is coming in and ensure timely payment from your market center. Consider:

- How many current deals need to be created in Opportunities?
- What probability percentages will you assign to each stage in Opportunities? (Hint: On a scale of 1-10, how likely are you to close the deal at that stage? If the answer is 7, use 70%. Over time, Command will calculate and track your actual numbers for each stage.)
- For each Stage, what items will you add to the Checklist Items?
- Will Checklist Items appear in more than one Stage or must they be completed within a specific Stage?
- Which screen view do you prefer in Opportunities? "List view" or "Board view"?

Strategy to consider

When setting up listing opportunities in Command, consider customizing stages not only based on achievement of key milestones, but also based on outstanding or pending tasks.

Example: For listing in the photography stage— Checklist Items for photography scheduled, photography completed, and photos uploaded can be created. These photography Checklist Items help track progress toward getting properties listed.



Level up—pick the next Command application to grow your business.

The transition to Command is a process. Once you have the essentials in place, shift into the next gear by choosing the next Command application to implement.

Ask yourself:

Which application, if implemented now, would provide results where I need them most?

What do I know or not know about the application? What is my plan to learn more?

How will implementing this application help my business?

Will I use this Command application in parallel with my current systems? What are the risks and benefits of doing this?

Get support:

- Ask Kelle, “How do I...?”
- Click the question mark icon in Command to view help articles and video demonstrations.
- Click the Support button in Command to ask questions, leave a message, or chat with live support.
- Attend Connect Live livestream training sessions.
- Email Support at support@kw.com