



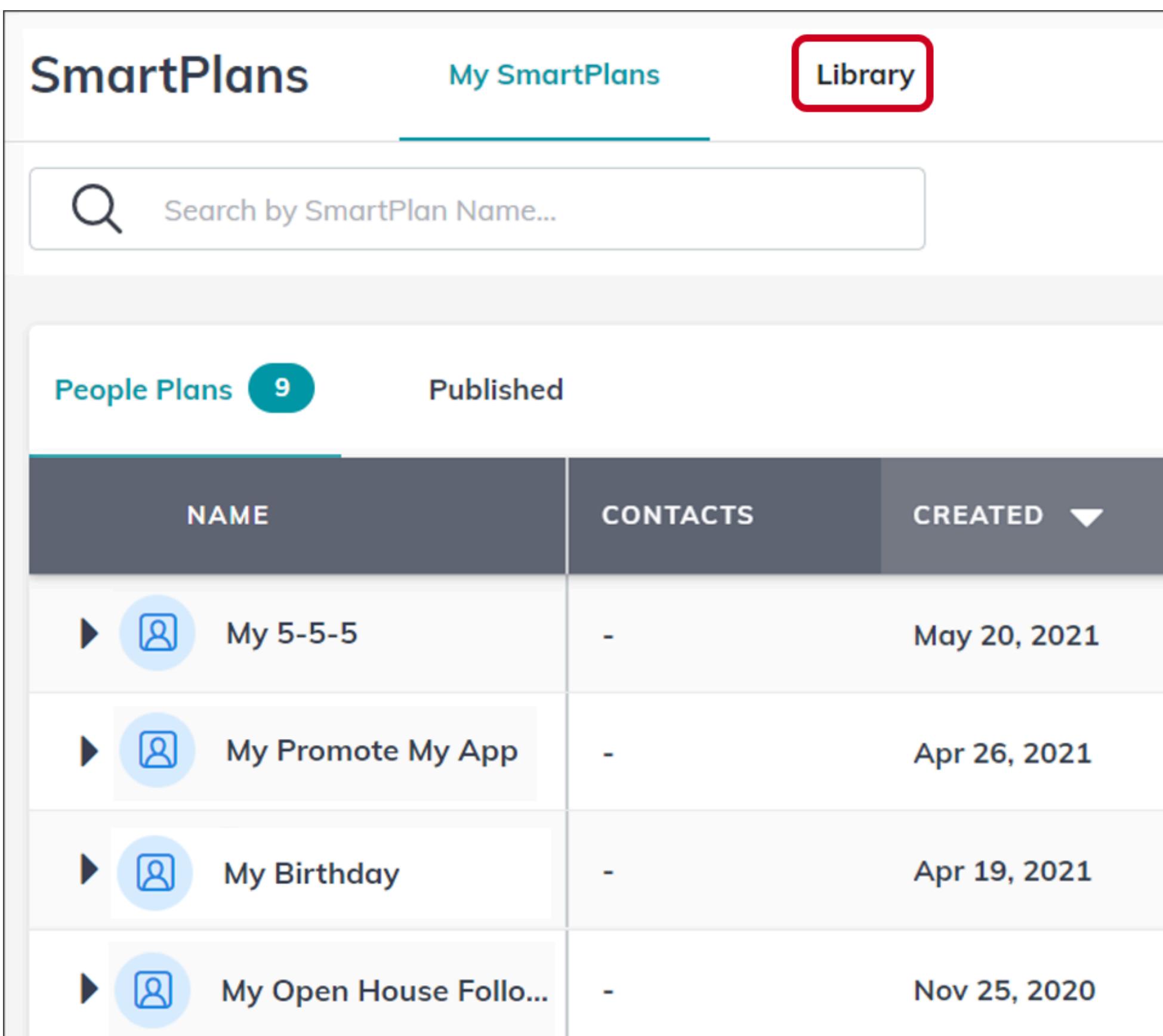
# Command Quick Guides

**Your Guide to Command:**  
*Add a Smartplan from the  
SmartPlans Library*

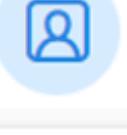


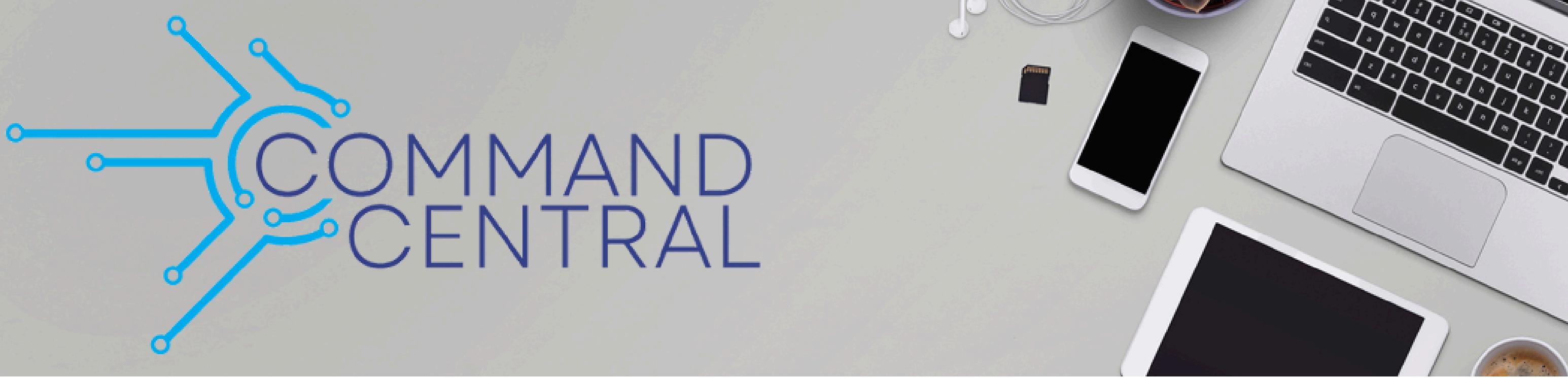
## Access

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
2. Click the **SmartPlans** icon, , on the left side of the home page.
3. Click **Library**, at the top right of the page.



The screenshot shows the 'SmartPlans' interface with the 'Library' tab selected. At the top, there is a search bar labeled 'Search by SmartPlan Name...'. Below the search bar, there are two tabs: 'People Plans' (9) and 'Published'. The 'People Plans' tab is active. The main area displays a table with four columns: 'NAME', 'CONTACTS', and 'CREATED' (with a dropdown arrow). The table contains four rows of data:

NAME	CONTACTS	CREATED
▶  My 5-5-5	-	May 20, 2021
▶  My Promote My App	-	Apr 26, 2021
▶  My Birthday	-	Apr 19, 2021
▶  My Open House Follo...	-	Nov 25, 2020



# Find a SmartPlan

SmartPlans    My SmartPlans    Library

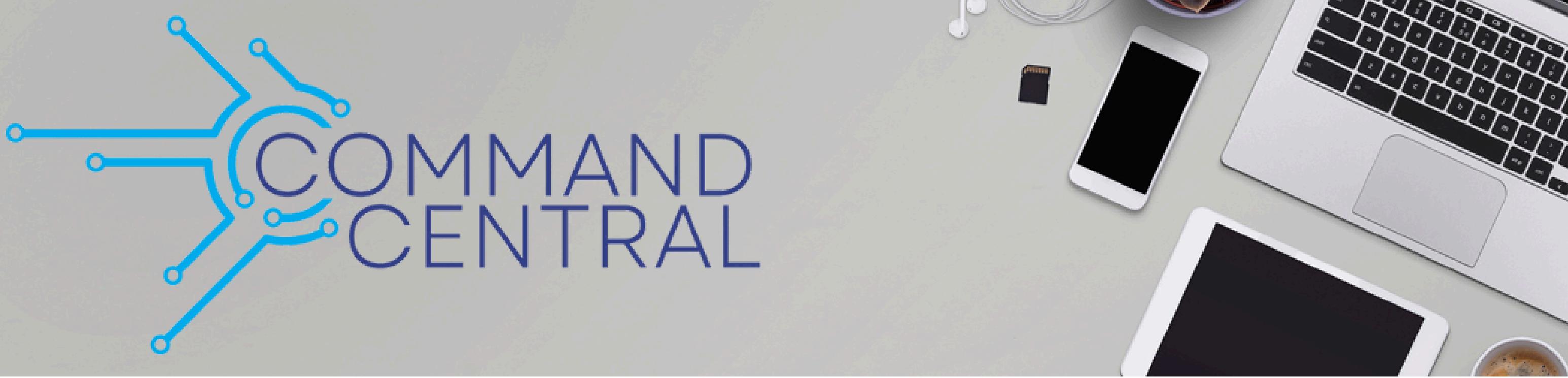
1  2  3

4 **Featured 9**    See All

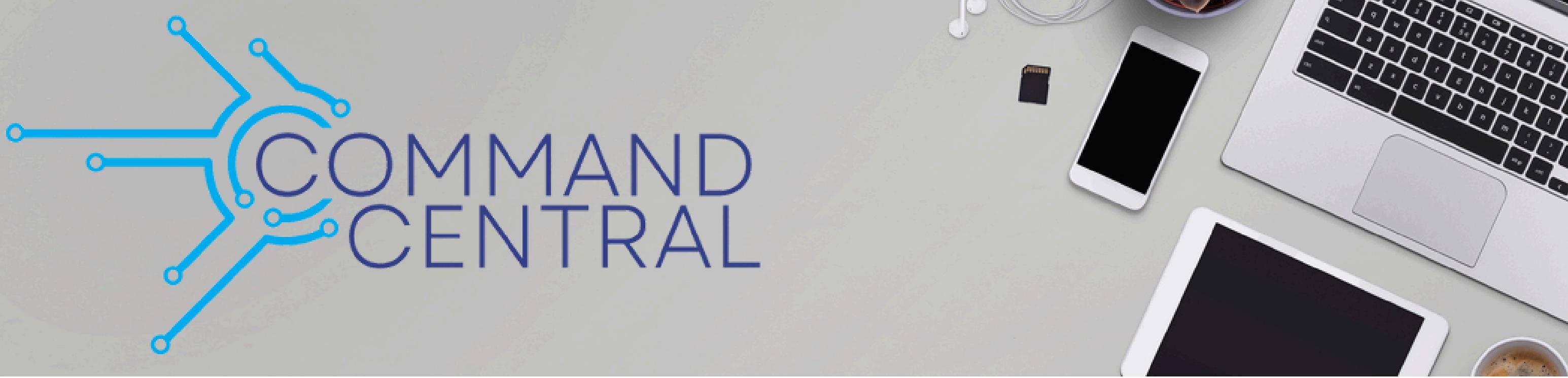
5 **5-5-5**  
Stay in touch with your Databank with multiple touches a year with Phone Calls, Hand Written Notes, Text Messages and Social Media Touches. Add 5 peo...  
Featured   Published: June 23, 2020  
2,488 Agents Using    (30)  
8 Steps   90 Duration   4 Touches  
FM Fred Moore Author   Free  
[View Steps](#)   [Add SmartPlan](#)

6 **My Long-Term Nurture**  
Stay top of mind by scheduling regular check-ins with your contacts over the span of six months.  
Featured   Published: June 22, 2020  
5,549 Agents Using    (7)  
8 Steps   31 Duration   3 Touches  
MM Marty Miller Author   Free  
[View Steps](#)   [Add SmartPlan](#)

Post closing follow up plan  
This is a follow up post closing. This plan checks in on the client, asks for a review, thanks them for the review, and then puts them on a nurture c...  
Featured   Published: June 23, 2020  
2,616 Agents Using    (9)  
13 Steps   25 Duration   6 Touches  
SD Shannon Dager Author   Free  
[View Steps](#)   [Add SmartPlan](#)



- 1** Use the **Search** to find specific SmartPlans. Users can search by the name of the SmartPlan, the author of the SmartPlan, and by description as well.
- 2** Click **Filters** to open the filters drawer. You are able to filter the library by SmartPlan type, duration, author, number of touches, number of downloads, or by rating.
- 3** Use the **View Category** drop-down to sort the library by most used, top rated, newest, and also featured.
- 4** The SmartPlans Library is broken up into several categories:
  - **Featured** - these are SmartPlans that Keller Williams have selected to highlight. Users will find Keller Williams and agent-created SmartPlans in this category.
  - **Keller Williams** - these are SmartPlans that Keller Williams has authored, like the Quarterly Call and Monthly Neighborhood Nurture SmartPlans. If you click this category title, it will filter the library by author to only show Keller Williams SmartPlans.
  - **Top Rated** - these are the SmartPlans that have the best rating compared to the number of reviews. Clicking this category title will sort the library by rating.
    - If a SmartPlan has 5 stars, but only one review, it won't be featured as predominantly as a SmartPlan with 4 stars and ten ratings.
  - **What's New** - these are the newest SmartPlans that have been published. If you click this category title, it will sort the library by published date.



**5** The SmartPlan card includes a few details that might help you determine if this is the right SmartPlan for your business:

- **SmartPlan Title**
- **SmartPlan Description** - this is the description the author added when publishing the SmartPlan. It should give you a good idea of what the purpose of the SmartPlan is.
- **Published Date** - this will show you when the SmartPlan was published, and this date will update if the author publishes any content edits. Some SmartPlans are timeless, like the Quarterly Call SmartPlan, but if a SmartPlan includes texts or emails, you might check to see if the content is still relevant.
- **Number of Downloads** - this will show you how many other associates have added this SmartPlan to their My SmartPlans list.
- **Rating** - this will show you the rating of the SmartPlan, using a 5 star system. It will also show you the number of associates who have rated the SmartPlan. Don't just look at the rating, but also at the number of ratings, to get a better idea of what people think.
- **Steps, Duration, and Touches** - this will give you a quick glance of the workflow. How many steps are included, how long will the SmartPlan run, and how many touches, or communication steps, are included. See #6 to find out how to see these in more detail.
- **Author** - this will show you who actually published the SmartPlan.

**6** Click **View Steps** to open a pop-up that will show each step in more detail. It will show what type of steps are included (email, delay, text, etc.), and if you hover a task or automatic email/text, you will be able to see the content of that step.



## Add a SmartPlan

1. Once you find the SmartPlan you want to add to your My SmartPlans list, click **Add SmartPlan**, at the bottom right of the SmartPlan card.

 My Long-Term Nurture

Stay top of mind by scheduling regular check-ins with your contacts over the span of six months.

*Published: July 1, 2020*

0 Downloads  (0)

12 Steps      41 Duration      4 Touches

 Annie Agent  
Author Free

[View Steps](#) [Add SmartPlan](#)



2. If there this SmartPlan includes multiple linked SmartPlans, you will need to download each separately. Click **Download** on each SmartPlan in the list, if you already have one of the linked SmartPlans, it will say Success.

### SmartPlan Bundle

This is a bundled SmartPlan - it contains multiple plans. Download all its contents to get started.

 My My Long-Term Nurture 4 touches   12 steps   41 duration	
  My Monthly Neighborhood Nurture 1 touches   3 steps   31 duration	
  My Quarterly Call Plan 1 touches   3 steps   91 duration	
  My Paul's 15 Connections Plan 15 touches   27 steps   66 duration	

[Cancel](#) [Download](#)



3. Once you have downloaded all of the linked SmartPlans, click **Download**, at the bottom right of the pop-up.

