Monthly Value Checklist

| **Complete dIRECTLY aFTER tRANSMITTAL** | | | |
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| # | Task/Step | TooL(s) | Done |
|  | Validate the Market Center Cap Management tool.   1. View the [Cap Management webinar](http://www.kwconnect.com/details/cap-management) with President and CEO John Davis on KWConnect. 2. Pull your YTD Closed Production report from your most recent transmittal (WinMORE) or the Closed Production Report – Prior Year (myKW Reports). 3. Compare the report to your Cap Management tool. 4. Add or remove associates from your Cap Management tool per your Market Center’s production status requirements.  *Note: Do not move existing associate Company Dollar anniversary dates.* | YTD Closed Production report (WinMORE) or Closed Production Report – Prior Year  (myKW reports)  Cap Management |  |
|  | As a leadership team, strategically reach out to associates who will cross over their Company Dollar Anniversary date in 90 days. Direct them to Team Leader consulting, KW training, or MAPS coaching to support them in capping quickly. | YTD Closed Production report  Cap Management |  |

| **Complete aFTER Reports are published on mykw** | | | |
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| # | Task/Step | TooL(s) | Done |
|  | After the 5th business day of the month, download the Market Center Multi-Year Trends Report from myKW. | Multi-Year Trend Report |  |
|  | Review the metrics of production on the Multi-Year Trends Report:   1. Closed Units 2. Closed Sales Volume 3. Listings Taken 4. Listings Taken Volume 5. Listings Sold 6. Listings Sold Volume 7. Contracts Written 8. Contracts Written Volume | Multi-Year Trend Report |  |
|  | Analyze each production metric of the Multi-Year Trends Report:   1. Look at the month-over-month change. 2. How does the current month compare to the previous month? 3. Find the record-setting month. Compare it to the current month. 4. Identify any all-time records! 5. Compare current year to prior years. | Multi-Year Trend Report |  |
|  | Analyze the production metrics that quantify prior activities:   1. Closed Units 2. Closed Sales Volume 3. Listings Sold 4. Listings Sold Volume | Multi-Year Trend Report |  |
|  | Analyze the production metrics that quantify future results:   1. Listings Taken 2. Listings Taken Volume 3. Contracts Written 4. Contracts Written Volume | Multi-Year Trend Report |  |
|  | Create the Market Center’s Monthly Language of Real Estate (LORE):   1. Download the Language of Real Estate template from the Growth Initiative Page of KWConnect under tools. 2. Add this month last year and this month’s values from your MLS or Board of Realtors for the eight metrics of production 3. Add the values from your Multi-Year Trends Report for the eight metrics of production 4. The spreadsheet will calculate the percentage difference between your Board and your market Center. | Multi-Year Trend Report  LORE |  |
|  | Analyze the LORE:   1. Analyze the metrics in which your Market Center is outpacing the Board. 2. Compare your Market Center to your Region and Keller Williams Realty at large. 3. Identify comparisons in which your Market Center shines. 4. Identify talking points. 5. Download the Local Expert Tool from the Growth Initiative page of KWConnect under Share Your Story. | LORE  Region Multi-Year Trend Report  KWRI Multi-Year Trend Report  Growth Initiative page on KWConnect |  |
|  | Create the Month’s Training and Tracking (T2):   1. Have a staff member take attendance at each training event. 2. Record attendance on the KWConnect Calendar by going to kwconnect > Profile > My Events. 3. [Run your Training Tracker (T2) results](https://www.kwmcangel.com/customer/en/portal/articles/2881472-training-tracker-t2---take-attendance-run-training-tracker-report-in-kwconnect?b_id=8713) by going to KWConnect > Profile > My Reports. 4. Use your results to update the Training Tracker Flier found on the Growth Initiative Page of KWConnect under Share Your Story. | T2  Growth Initiative page on KWConnect  MCA Profile page on KWConnect |  |
|  | Review associate CGI goals by downloading the reports located under Reports > CGI on myKW Reports. Identify the following:   * Number and percentage of associates who have goals * Associates who are on track to achieve their CGI goals * Associates who are not on track to achieve their CGI goals | myKW Reports |  |
|  | Market Center leadership (OP, TL, MCA) meets to identify the value statements and scripts for the month.   1. MCA shares analysis of value tools 2. Leadership team identifies Market Center value statements for the month. 3. Leadership team identifies scripts **agents** can use when talking with their clients to describe the Market Center’s market share and to underscore their validity. 4. Leadership team identifies scripts from the T2 Market Center leadership can use to support the impact of the Keller Williams training and KW MAPS Coaching as production solutions. 5. Leadership team identifies [scripts](http://www.kwconnect.com/details/2016-03-14-56e7340a6c7dd-docx) Market Center staff can use to share the Market Center’s value with agents. 6. Leadership team identifies [recruiting scripts](http://www.kwconnect.com/page/gi) that incorporate the Market Center’s value. See the Growth Initiative page on KWConnect > Role Specific Resources. | Multi-Year Trend Report  LORE  T2  Growth Initiative page on KWConnect |  |
|  | Market Center leadership (OP, TL, MCA) identifies strategies to improve the Market Center’s value for the following:   1. Associates whose production has fallen as identified in validating Cap Management 2. Number and percentage of associates with CGI Goals 3. Associates who are achieving CGI Goals 4. Associates who are not achieving CGI Goals 5. Associates on the Cap Management tool who are 90 days out from crossing their Company Dollar Anniversary Date 6. Opportunities identified in analyzing the Multi-Year Trend Report 7. Opportunities identified in analyzing the LORE Tool 8. Opportunities identified in analyzing T2   Utilize the following consistency in activity; by focusing on units, not volume; KW Training and KW MAPS Coaching; and systems for associates to create CGI goals and engage in ongoing accountability conversations: | Validated Cap Management Tool  CGI Calculator  Multi-Year Trend Report  LORE  T2  Calendar on KWConnect |  |
|  | Edit the Local Expert materials of the Career Growth Initiative with the Market Center’s value for the month.   * Post it where associates can retrieve it and further edit it with their information. (For example, KWConnect, Google Drive, etc.) | Multi-Year Trend Report  LORE  T2  Local Expert |  |
|  | Edit the Performance Report and corresponding Press Release available from KWConnect with the Market Center’s value for the month.   * Integrate the Performance Report with recruiting materials for the month. | Multi-Year Trend Report  LORE  T2  Performance Report |  |
|  | Schedule a meeting with Market Center staff to share the Market Center value statements and scripts.   * Identify action steps for the staff in using the scripts. (For example, point associates to Ignite.) | Multi-Year Trend Report  LORE  T2  Local Expert  Performance Report |  |
|  | Share the month’s value statements, Local Expert materials, and scripts agents can use in the Market Center team meeting. | Multi-Year Trend Report  LORE  T2  Local Expert |  |
|  | Distribute the month’s value statements throughout the Market Center. See the Share Your Story section of the [Growth Initiative page](http://www.kwconnect.com/page/gi) on KWConnect for templates. For example:   * LORE and Four Conversations posters * Bulletin boards * Digital displays * Email signatures * Value videos * Update Market Center trainers * Update internal social media venues |  |  |
|  | Distribute the month’s value statements beyond the Market Center. For example:   * Press releases (See the Share Your Story section of the [Growth Initiative page](http://www.kwconnect.com/page/gi) on KWConnect for templates.) * Update external social media venues |  |  |

If you have questions or need help, email [kwmcangel@kw.com](mailto:kwmcangel@kw.com).