

# Instructions for Using KW WebMORE Goal Tracking

Agents

## **OVERVIEW:**

All KW agents are encouraged to enter their Recruiting, Productions, Financial and Statistical Goals for 2002 before January 1, 2002.

Taking your business to the next level requires not only attention to marketing and lead generation, but also to performance metrics, particularly those surrounding production and financial numbers.

## **GETTING STARTED:**

1. Go to <http://intranet.kw.com>;
2. Enter your Username and Password and select **Goals** (If you select Intranet from the Login page, you will have to logout and try again); and
3. Once inside **WebMORE**, select the **Initialize Goal Entry** button.

## **GUIDELINES:**

1. WebMORE Goal Tracking only accepts positive whole numbers, so please do not enter decimals or negative numbers;
2. Please do not enter non-numeric values in each field (such as \$ or , or .);
3. Moving between fields requires using the Tab Key, using the Enter key will take you out of the field and you will have to re-select the field you want to go to; and
4. Save your work every ten minutes, For more information on Save, refer to that section on page 5.

You can now choose which of the four sets of goals to enter: **Recruiting, Production, Financial or Statistical**.

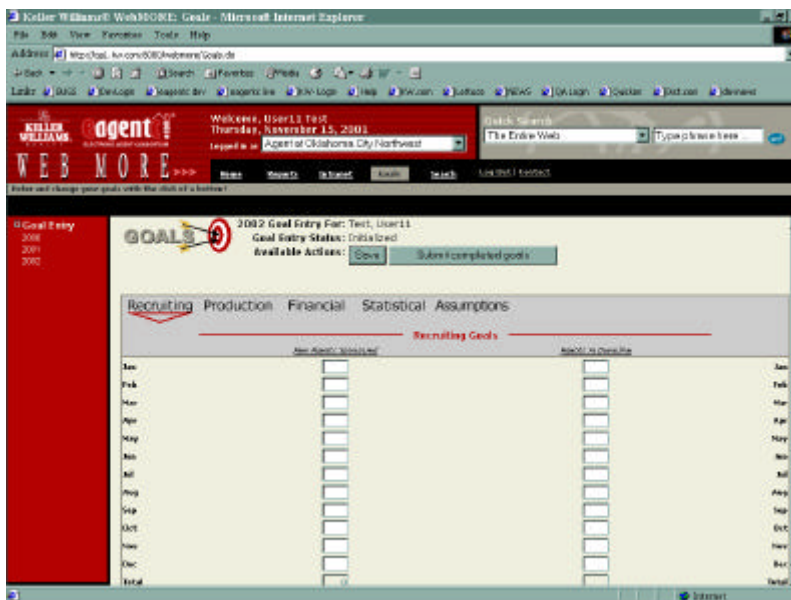
## **RECRUITING GOALS:**

1. Click on the **Recruiting** button and, in the resulting screen, enter your goals for:
  - a. **New Agents Sponsored** – Number of agents who name you as their sponsor during that month; and
  - b. **Agents in Downline** – Total number of agents in the Seven Levels of your Profit Share Tree.

Be sure to add the information for agents sponsored and agents in Downline for EVERY month in 2002. You will notice that the **Totals** are automatically calculated for you.

2. After you have entered all your Recruiting Goals, click **Save**.
3. You are now ready to enter Production Goals!

# Instructions for Using KW WebMORE Goal Tracking Agents



*Recruiting Goals Entry Screen*

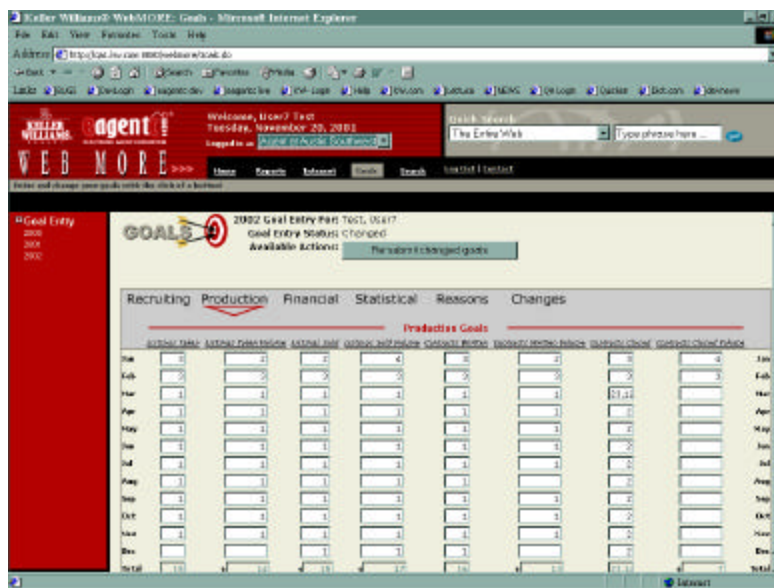
## **PRODUCTION GOALS:**

1. Click on the **Production** button and, in the resulting screen, enter your goals for:
  - a. **Listings Taken** – Number of listing contracts entered into with sellers during each month;
  - b. **Listings Taken Volume** – Total of the initial listing price for all listings taken during each month;
  - c. **Listings Sold** – Number of listings that go to sales contract and then to a completed closing;
  - d. **Listings Sold Volume** – Total of the final sales prices of the listing sold during each month;
  - e. **Contracts Written** – Number of real estate contracts that are entered into and approved by both a buyer and a seller;
  - f. **Contracts Written Volume** – Total of the agreed upon sales price for all contracts written during each month;
  - g. **Contracts Closed** – Number of real estate contracts that are completed – moneys dispersed and ownership changed; and
  - h. **Contracts Closed Volume** – Total of the final sales prices of all contracts closed during each month.

Be sure to add the information in each category for EVERY month in 2002. You will notice that the **Totals** are automatically calculated for you.

2. After you have entered all your Production Goals, click **Save**.
3. You are now ready to enter Financial Goals!

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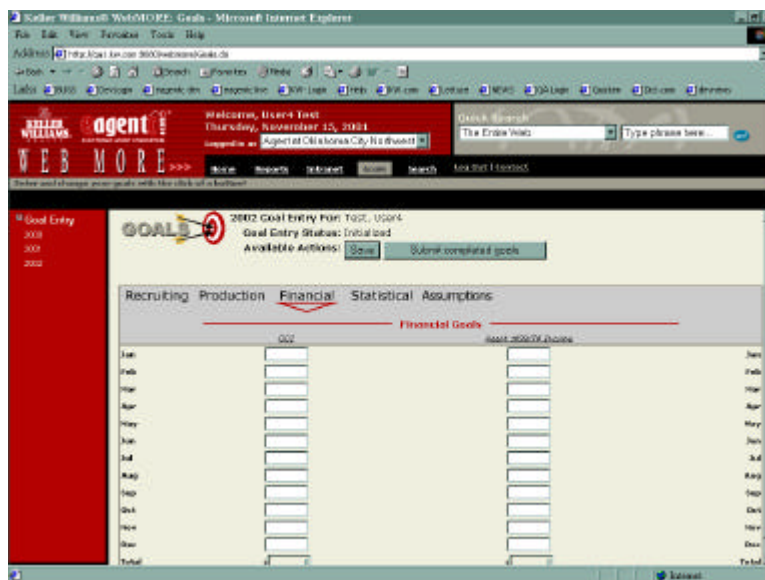
Production Goals Entry Screen

## FINANCIAL GOALS:

1. Click on the **Financial** button and, in the resulting screen, enter your goals for:
  - a. **GCI** – Gross Closed Income - Commission Revenue plus bonuses minus referrals minus concessions; and
  - b. **Agent 1099/T4 Income** – Net Income after Royalty, Company Dollar and non-taxable deductions - reported to the IRS.

Be sure to add the information in each category for EVERY month in 2002. You will notice that the **Totals** are automatically calculated for you.

2. After you have entered all your Financial Goals, click **Save**.
3. You are now ready to enter your Statistical Goals!



Financial Goals Entry Screen

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Agents

## STATISTICAL GOALS:

1. Click on the **Statistical** button and, in the resulting screen, enter your goals for:
  - a. **Average Listings Taken Price** – Total listing taken volume divided by the number of listings taken during the same time period;
  - b. **Average Sales Closed Price** – Total closed sales volume divided by the number of closed sides (units);
  - c. **Average Closed Commission** – Total commissions for that time period divided by the number of closed sides (units); and
  - d. **Commission as % of Sales Price** – Total closed commissions divided by the total sales volume during the same time period.

Be sure to add the information in each category for EVERY month in 2002.

2. After you have entered all your Statistical Goals, click **Save**.
3. You are now ready to enter your Assumptions!

*Statistical Goals Entry Screen*

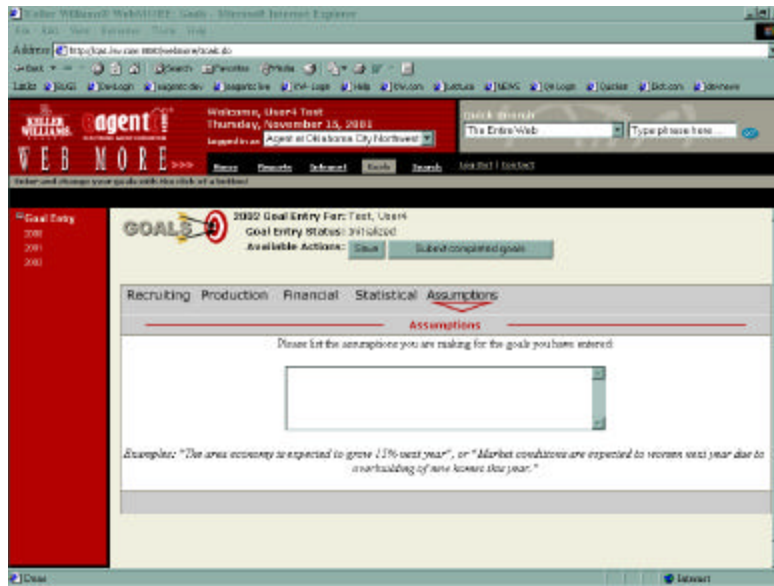
## ASSUMPTIONS:

Click on the **Assumptions** button and, in the resulting screen, there is only one field. In this field, you can make notes about why your goals have been set at these levels.

For example, if you know that there is a large corporation moving to area and predictions are that new home sales will increase by 15% over the next year to accommodate relocations, that may have influenced your decision to increase your production goals by 15%. By making notes accordingly in this section of goal tracking, you will be reminded of this assumption if you wanted to remember at a later date.

Please note that this **Assumptions** screen will only appear the first time you enter goals into the Goal Tracking system, save them, and submit them. We will explain more about this later.

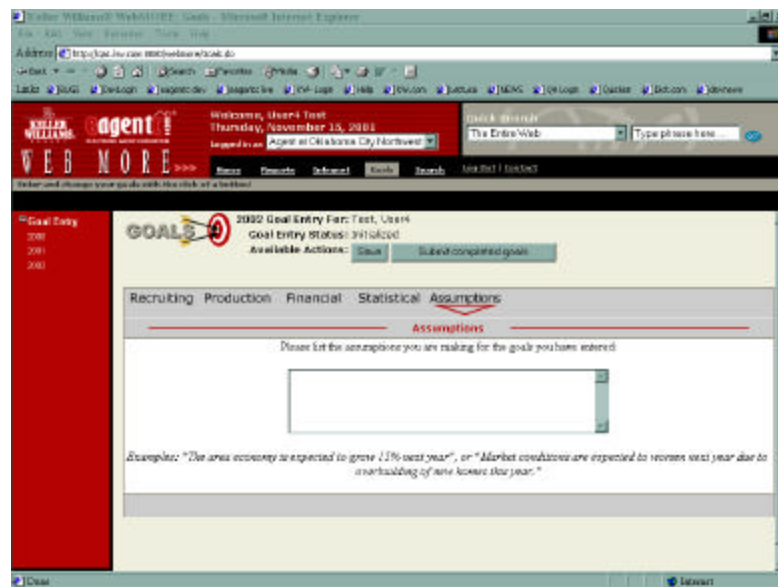
# Instructions for Using KW WebMORE Goal Tracking Agents



Assumptions Entry Screen

## SAVE:

The **Save** button stores your Goals (Recruiting, Production, Financial, and Statistical) and Assumptions locally. The **Save** gives you the option of tackling this task over a series of days, before submitting them for review by your Team Leader. (Note: Once you **Submit Completed Goals** the **Save** feature is no longer an option.)



Save Feature

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Agents

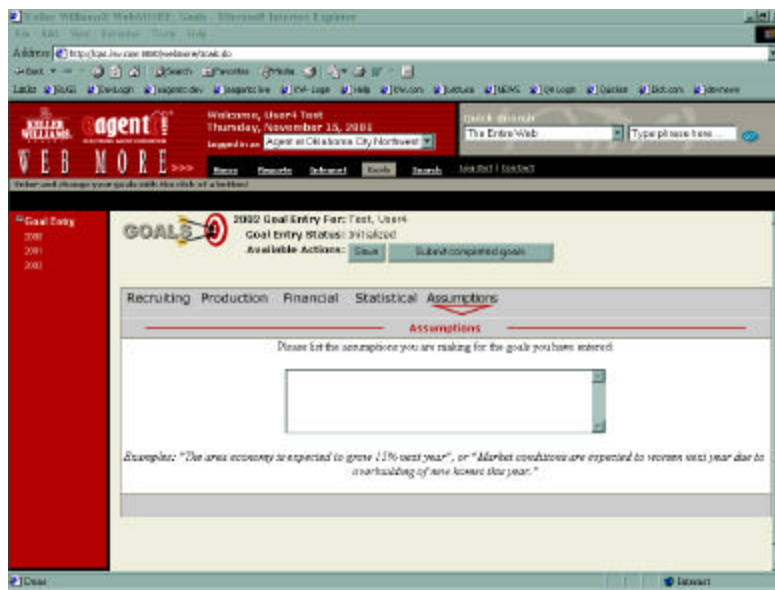
## **SUBMIT COMPLETED GOALS:**

After you have entered your

1. Recruiting Goals,
2. Production Goals,
3. Financial Goals,
4. Statistical Goals,
5. Assumptions, and
6. Saved them...

...Simply click the **Submit Completed Goals** button and your goals will be submitted to your Team Leader for review.

Please note that *even though you have entered your initial goals and submitted them, you will be able to change your goals and re-submit them as necessary.*



*Submit Completed Goals Feature*

## **REASONS:**

Even though you have entered your initial goals and submitted them, you will be able to change your goals and submit them again. After initial goal entry and submission, you will notice that a Reasons button has replaced the Assumptions button.

You will only use the **Reasons** button when you are changing your goals and re-submitting them for Team Leader Review.

1. Enter your new set of goals.
2. Click on the **Reasons** button and enter a description of why you changed your goals. (This information will be sent to your Team Leader with the new goals you entered after you re-submit them.)
3. Click on **Re-Submit Changed Goals**. Your new goals and reasons for the changes will appear in a Market Center goal tracking report.

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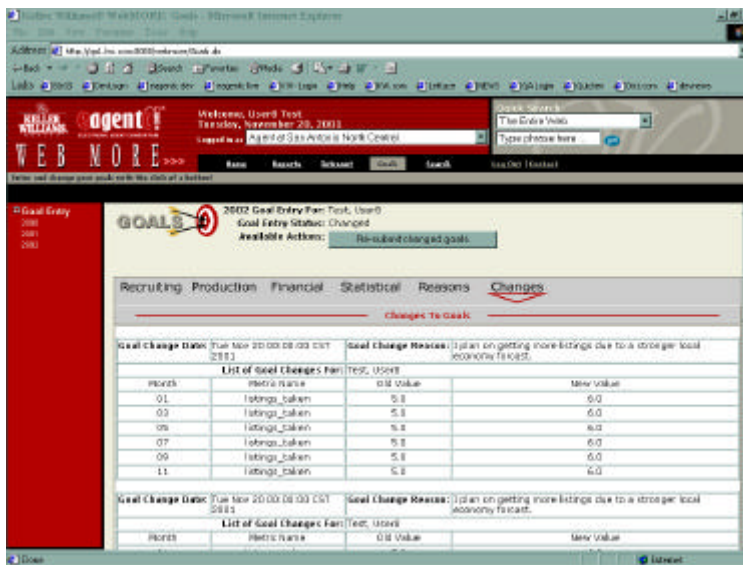


Reasons Entry Screen

## CHANGES:

After you have re-submitted changed goals, you can view all the changes you have made to your goals.

1. Click on **Changes** for a complete record of changes to your goals.



Changes Screen