Customize Opportunities

Because no two businesses are the same, the **Opportunities** applet in Command can be fully customized based on your unique business needs. Use this job aid to create a plan for how you want deals to move through your pipeline, so you can know exactly where your clients are in the process at any time.

Consider the following approach:

A. Watch the KWU Livestream course, *Stay on Top of Opportunities from Lead to Close.*

B. When you are ready to start planning your strategy for Opportunities, use this job aid to document your plan.

C. Customize Opportunities for your business. For additional support, see the Resources section of this guide.

1. Set Standards

In this first step, determine when **Opportunities** should be created or archived for **Leads** and **Contacts.**

When should Opportunities be created?			
	Listings	Buyers	Leases
Opportunities are created when the client shows intent to buy, sell, or lease at some point in the future. What standards will you follow for creating Opportunities?			
When are Opportunities truly "**Lost**" versus being moved back to the **Cultivate** Phase?			

2. Determine Stages

Stages created within pipeline **Phases** can help you monitor the progress of an opportunity through your pipeline. This can provide insights into where opportunities may stall or client may need additional support. When creating Stages, consider:

- Do the default Stages work for you, or will you update existing Stages and create new Stages?
- What business insights can you gain in each Stage?
- When will an opportunity to move from Stage to Stage?

What Stages are needed in each Phase of Opportunities?					
	Cultivation	Appointment	Active	Under Contract/Pending	Closed
Listings					
Buyers					
Leases					

3. Set Checklist Items for Stages

For the Stages you listed in Step 2 of this guide, outline the **Checklist Items** to track in each Stage. When planning Checklist Items, consider:

- What transaction milestones and customer service activities will be tracked?
- Can some Checklist Items be completed at various Stages?
- What **standards** will you set for which items are optional or required for an Opportunity to move to the next Stage or Phase?

Review the Checklist example below to see how this could look for Listings in the Active Phase and Pre-Listing Stage. To map out your own Checklist Items for Stages, click the Checklist Template button at the bottom of the page to insert template pages at the end of this document. Use the inserted pages to map your Checklist Items.

Example:

Opportunity Type: *Listings* **Phase Name:** *Active*	**Stage Name:** *Pre-Listing*
Checklist Item	Standards
Stager Scheduled	*Optional*
Reschedule Stager	*Optional*
Staging Complete	*Optional*
Photographer Scheduled	*Required*
Reschedule Photographer	*Optional*
Property Photos Uploaded	*Required to move to next Stage*
Ready to List: Client Check-in Call	*Recommended*

Checklist Template

[Click this button to insert template pages at the end of this document.]

4. Customize Opportunities in Command

Once you have outlined your standards, Stages, and Checklist Items for your business, edit or customize Stages and Checklist items in Command.

Resources

- You can find more training resources about Opportunities on the Tech-Enabled Agent page on KWConnect.
  - Livestream Training
  - Guides
  - On-Demand Videos
  - How-To Videos
  - Tech-Enabled Agent Community Group
- For help articles about Opportunities:
  1. Log in to Command
  2. Go to the Opportunities applet
  3. Click the question mark icon
- Additional resources:
  - Need help with Opportunities? Click the Support button in Command.
  - Suggestions for product enhancements? Click the Labs button in Command.

