

Kelle AI App & KWConnect Referrals



DIGITAL MARKETING EXPERTS

SCOTT LE ROY MARKETING

www.SLMTraining.com

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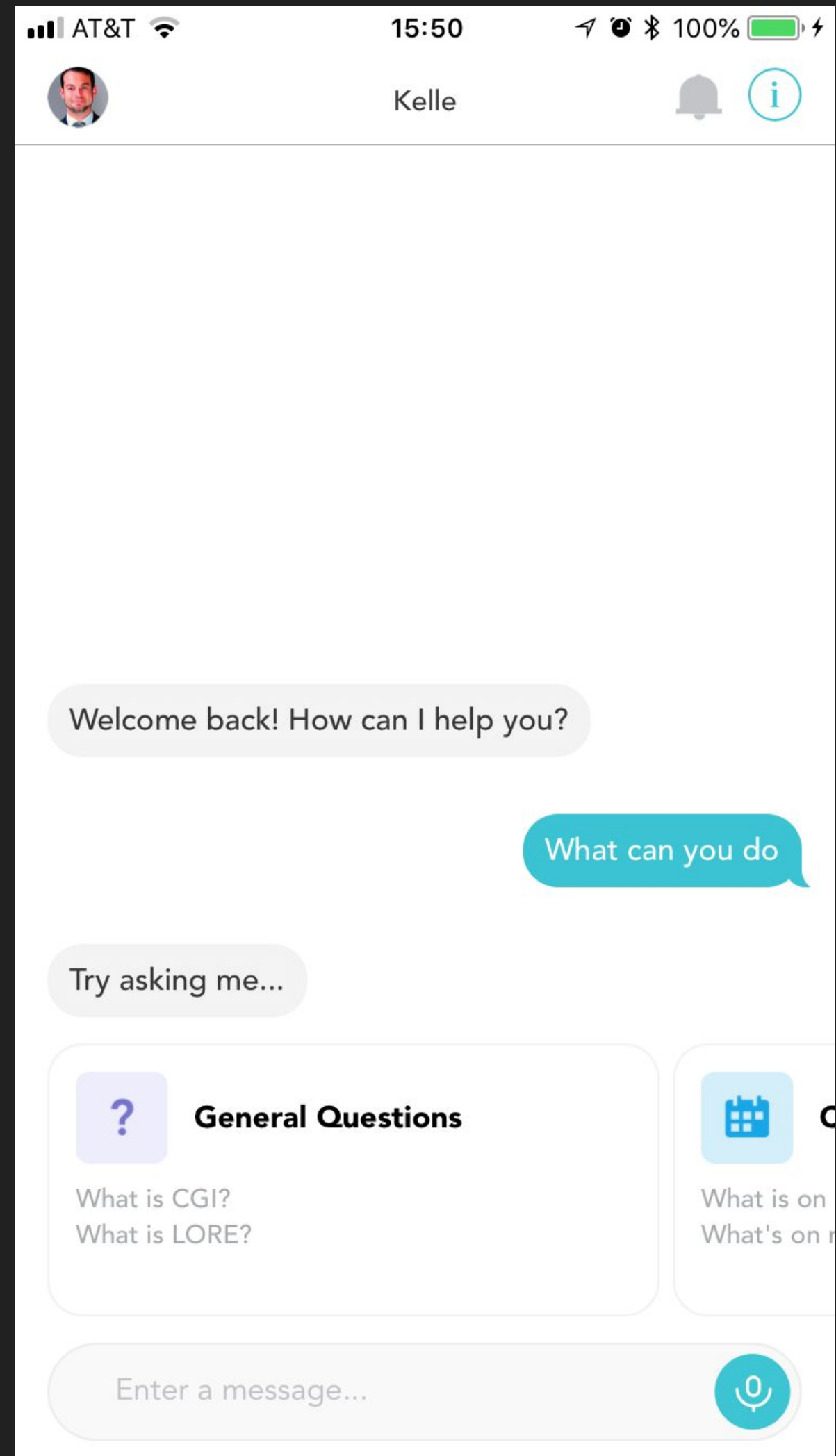
Considerations

Kelle is still an infant

Treat her like a two-year-old:

- Simple commands
- Specific commands
- Manage expectations

Ask her “What can you do?” for a general idea of her commands

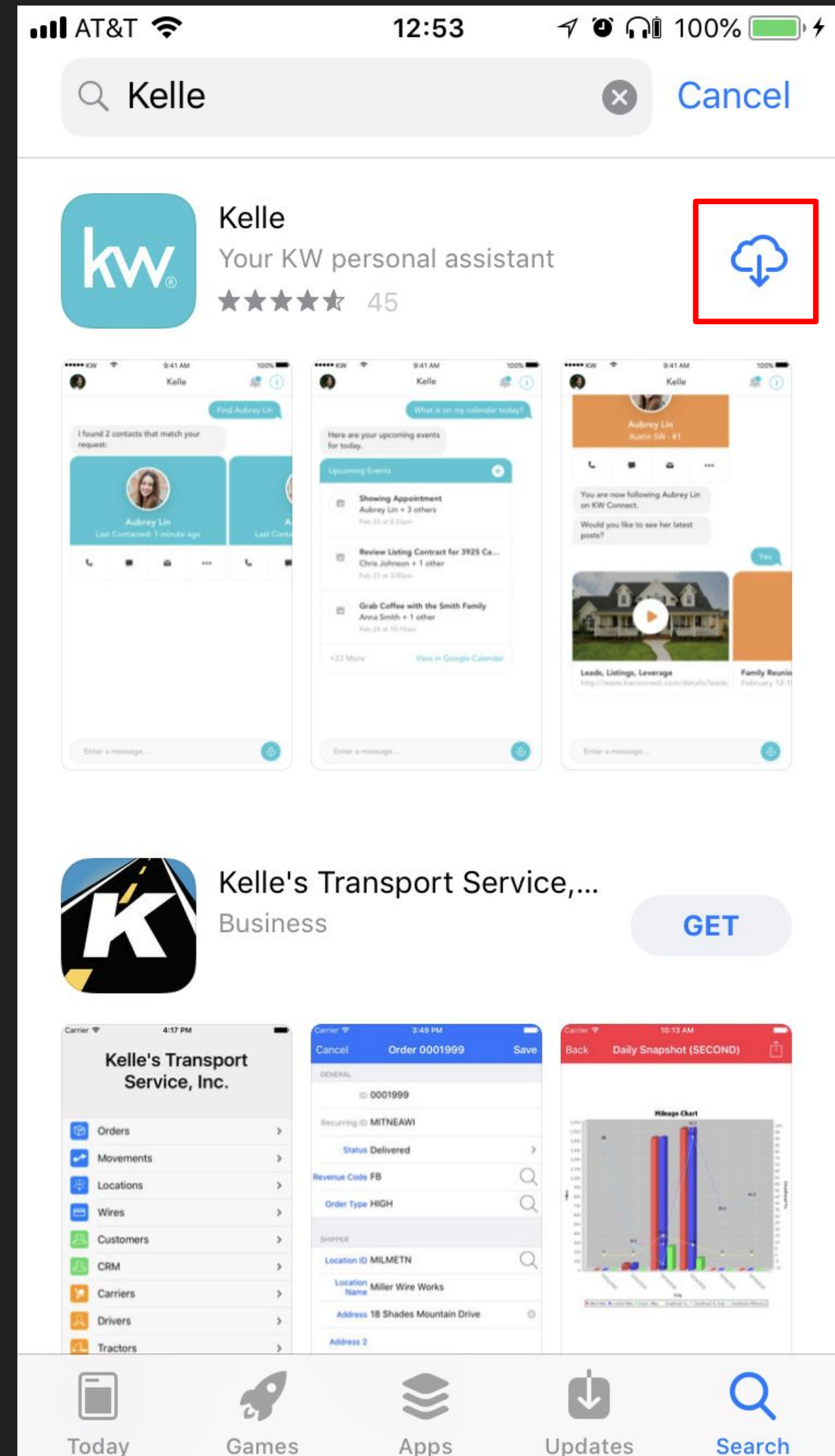


Download Kelle

Just search for Kelle in the App Store or Google Play Store and download the app

Kelle currently (2018-05-16) has issues with iPhone X

Kelle is not currently available on Windows Phone or Blackberry

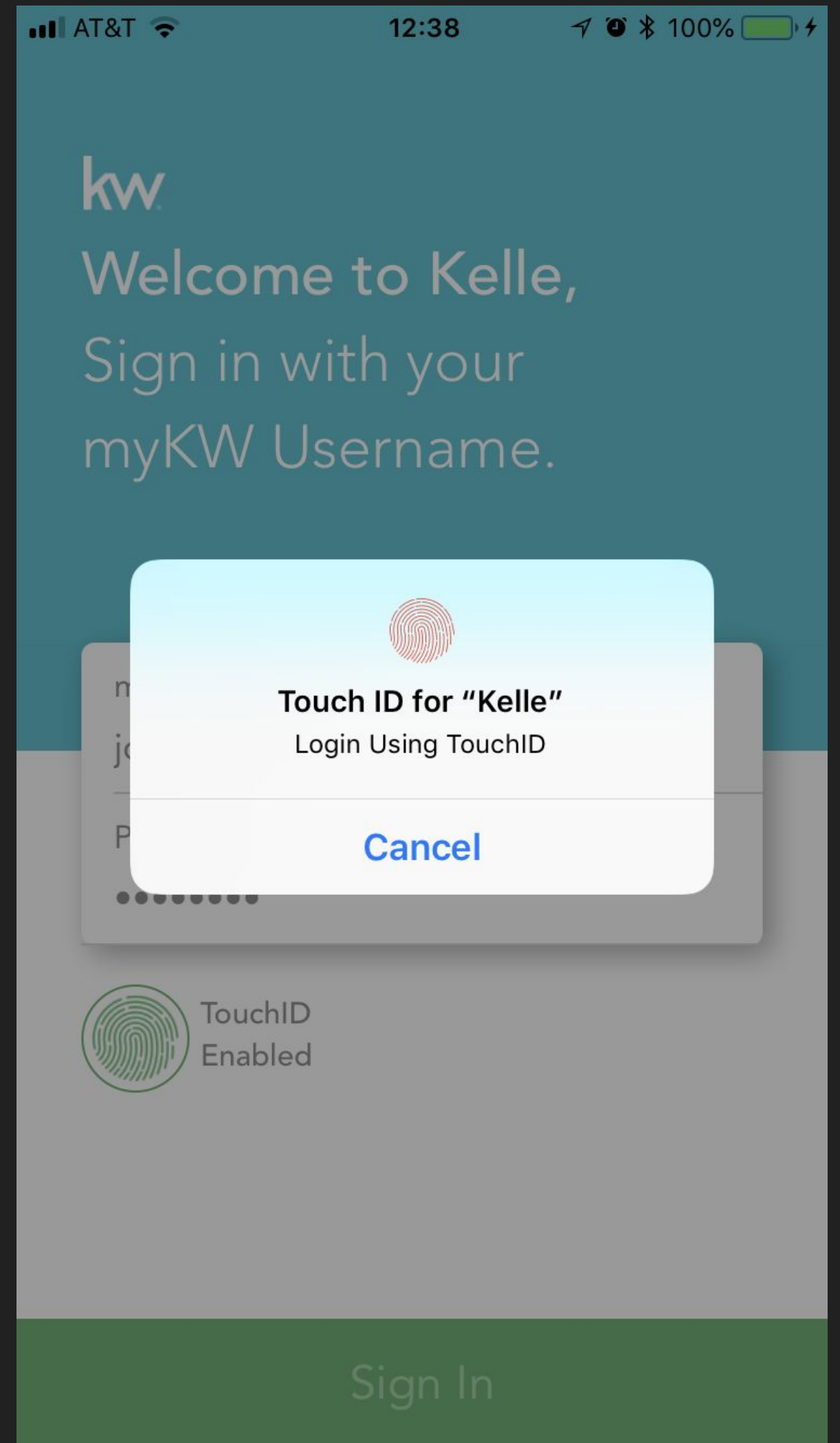
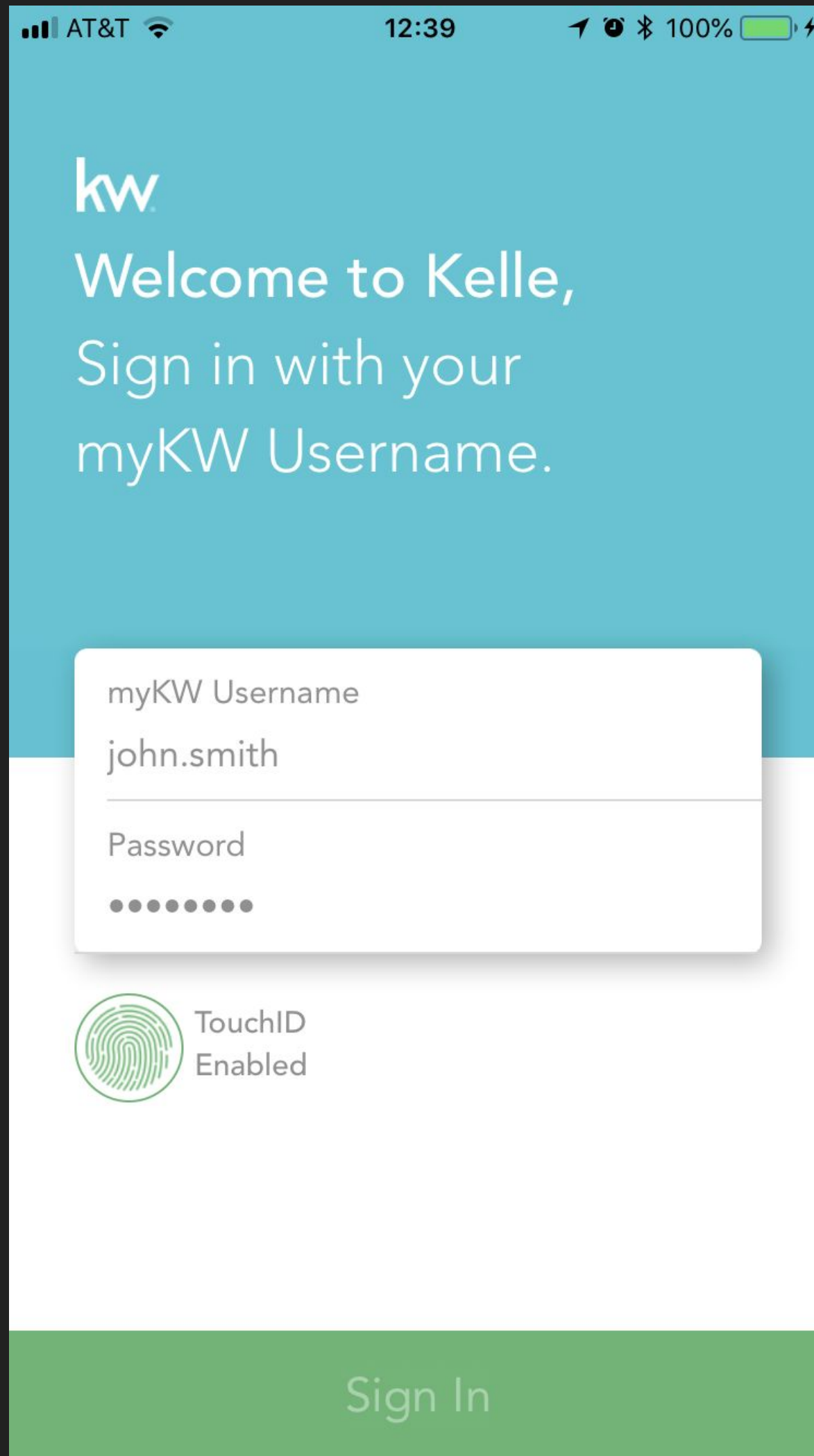


Sign In

Sign in to Kelle using your myKW username and password

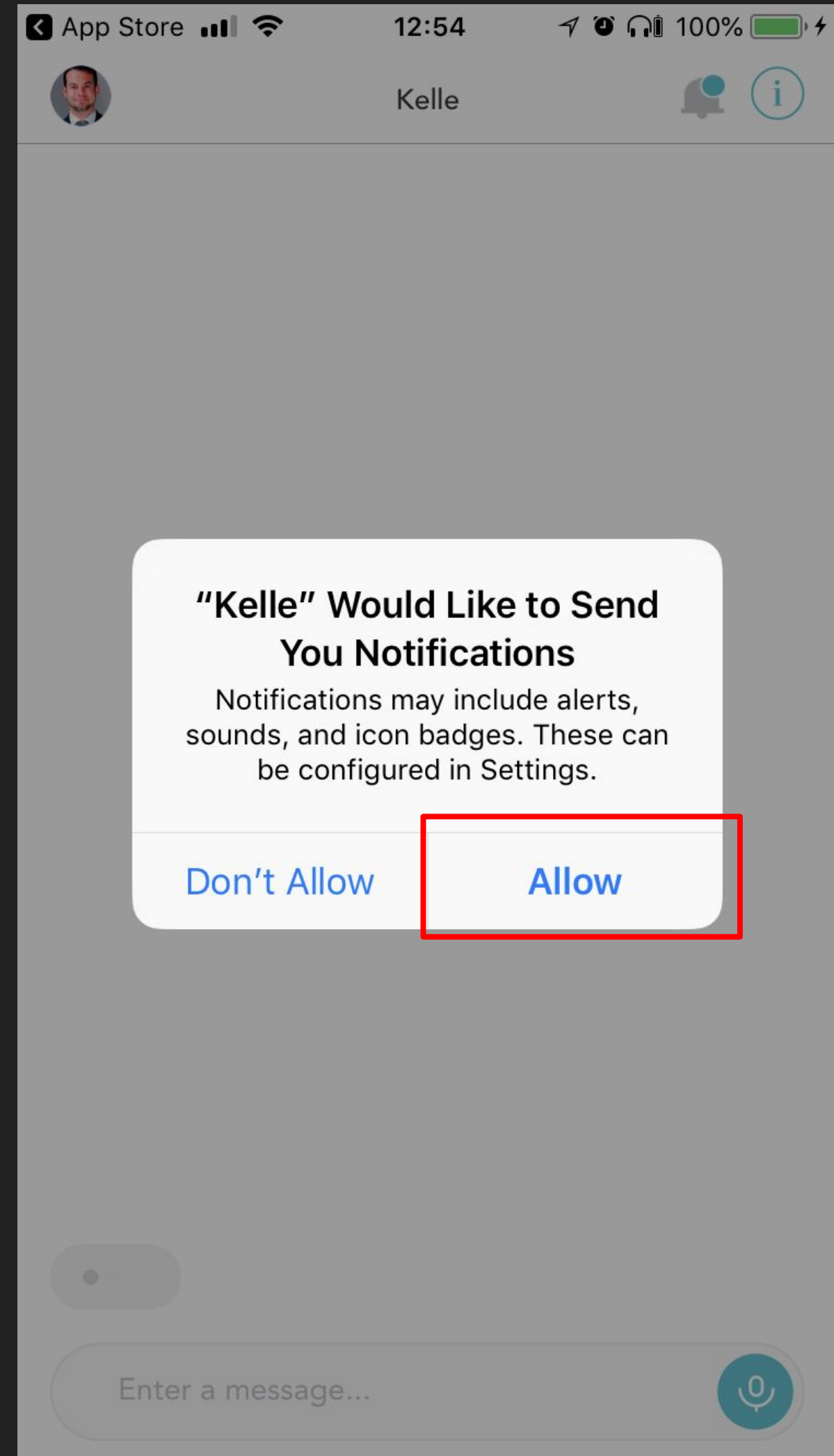
You may also tap to enable TouchID on Apple devices

FaceID on iPhone X does not currently work with Kelle



Allow Notifications

Once Kelle is installed, you will likely want to allow notifications, to receive real-time updates on your active referrals



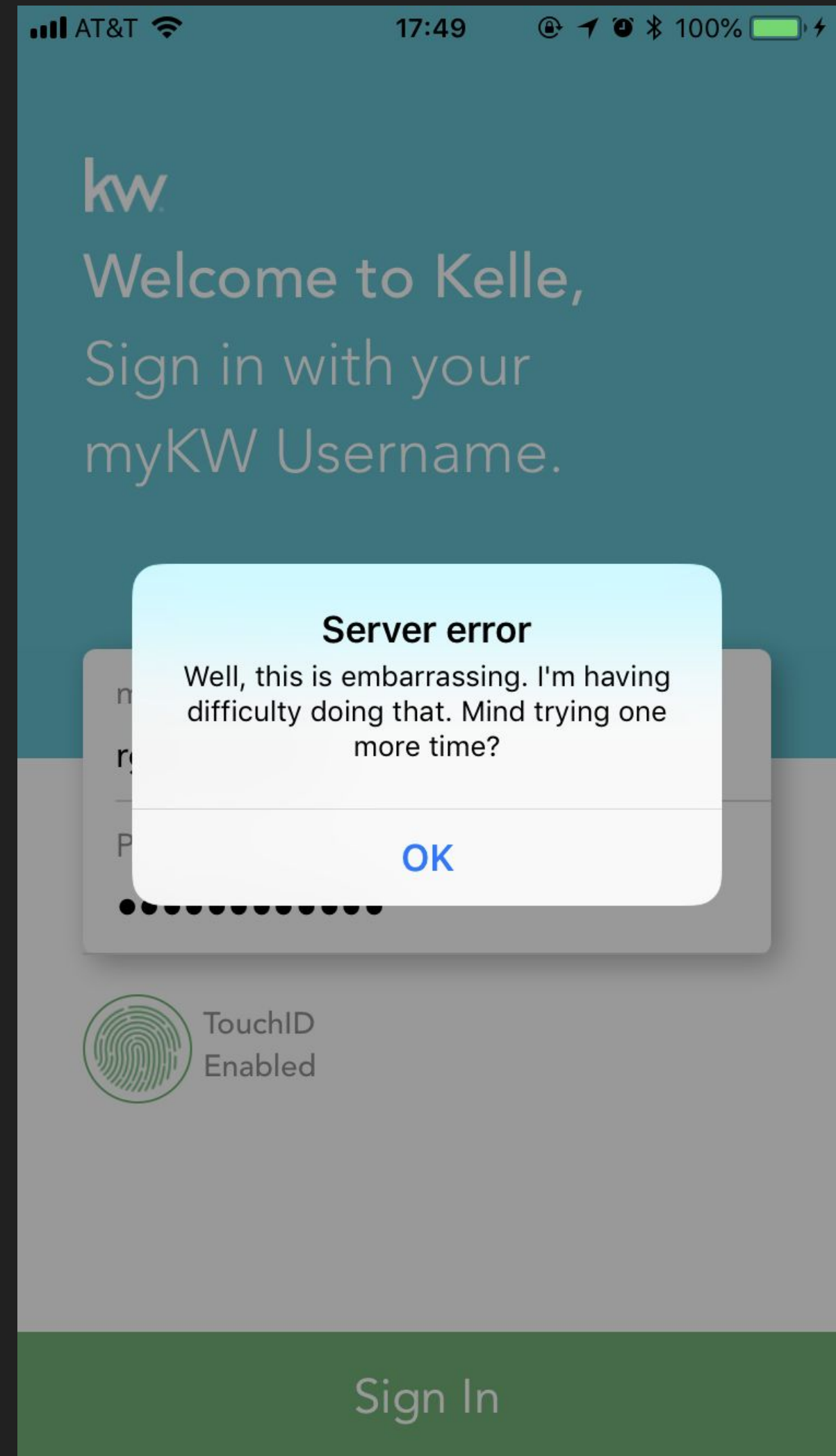
Sign In Errors

If you are unable to sign in to Kelle, contact KW International support at

support@KW.com

or

512-306-7191



Home Page/Chat

The Kelle home page is essentially a chat with Kelle herself

This is where you will type or speak your requests to Kelle

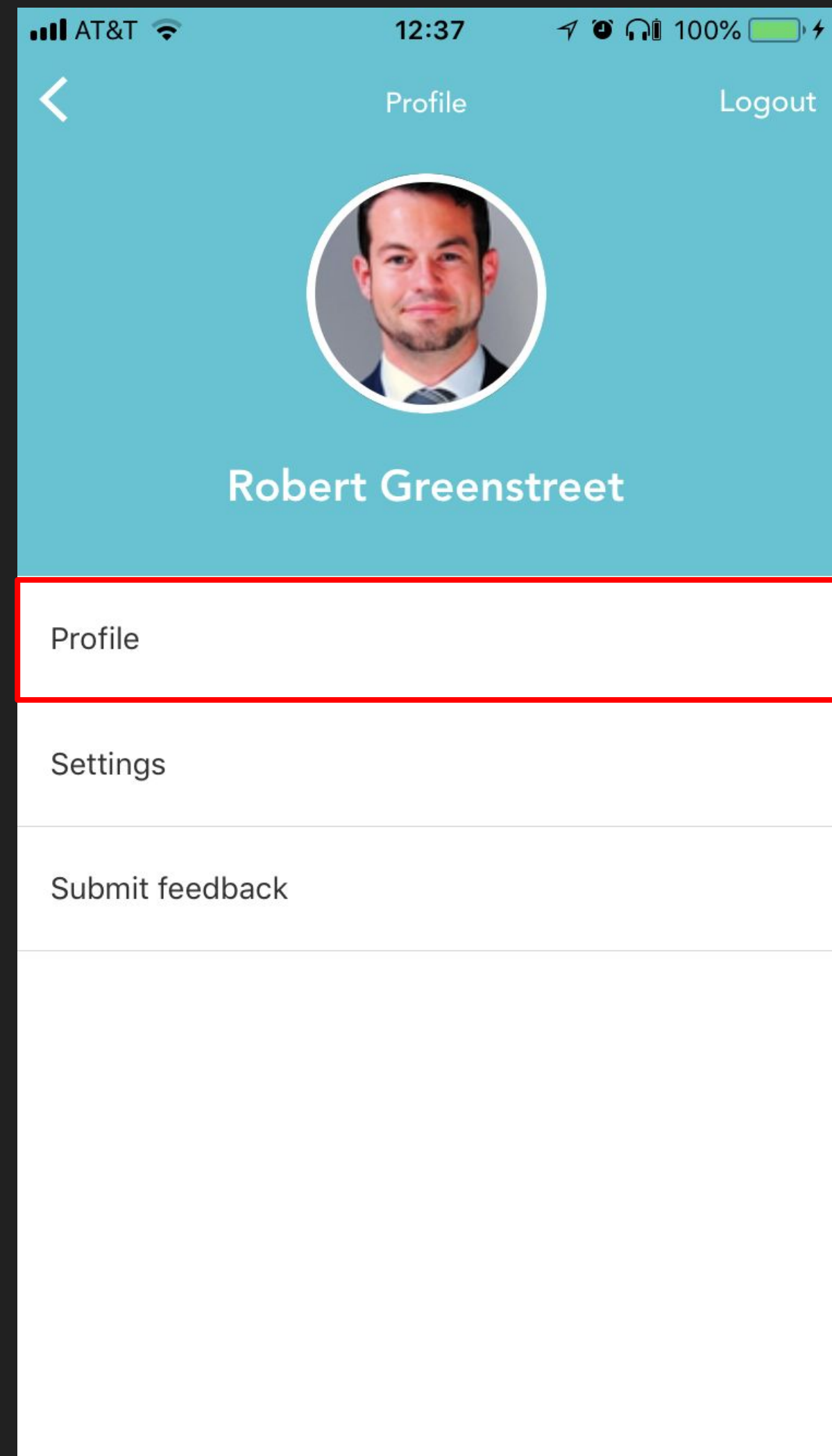
To open the menu, tap your picture in the top left



Menu/Profile

You can view your profile, change settings, or submit feedback to KW International here

Tap on “Profile” to see your profile

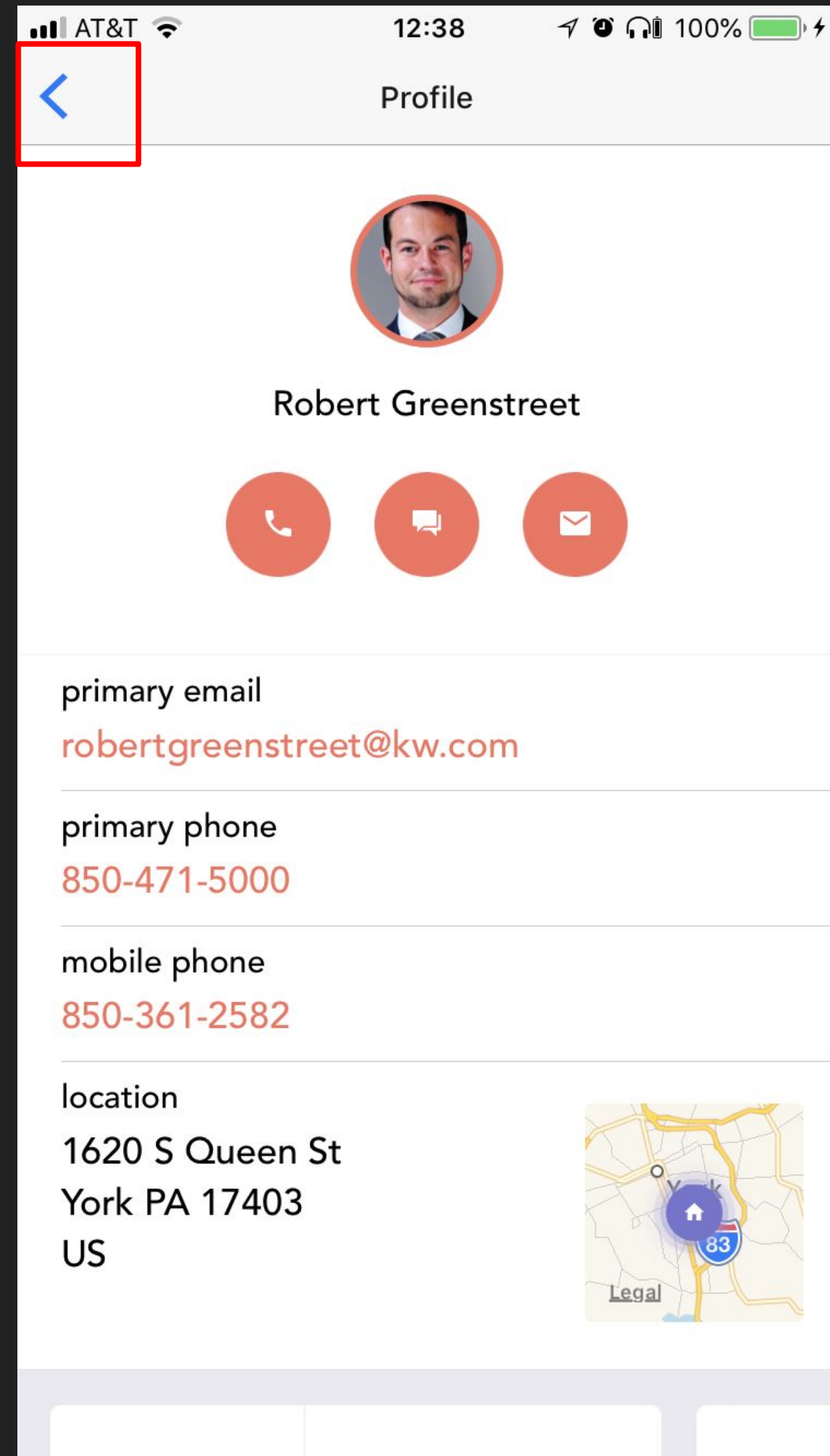


Your Profile

You can only *View* your profile within Kelle, not make changes to it

Changes are made within KWConnect on a computer (Covered later)

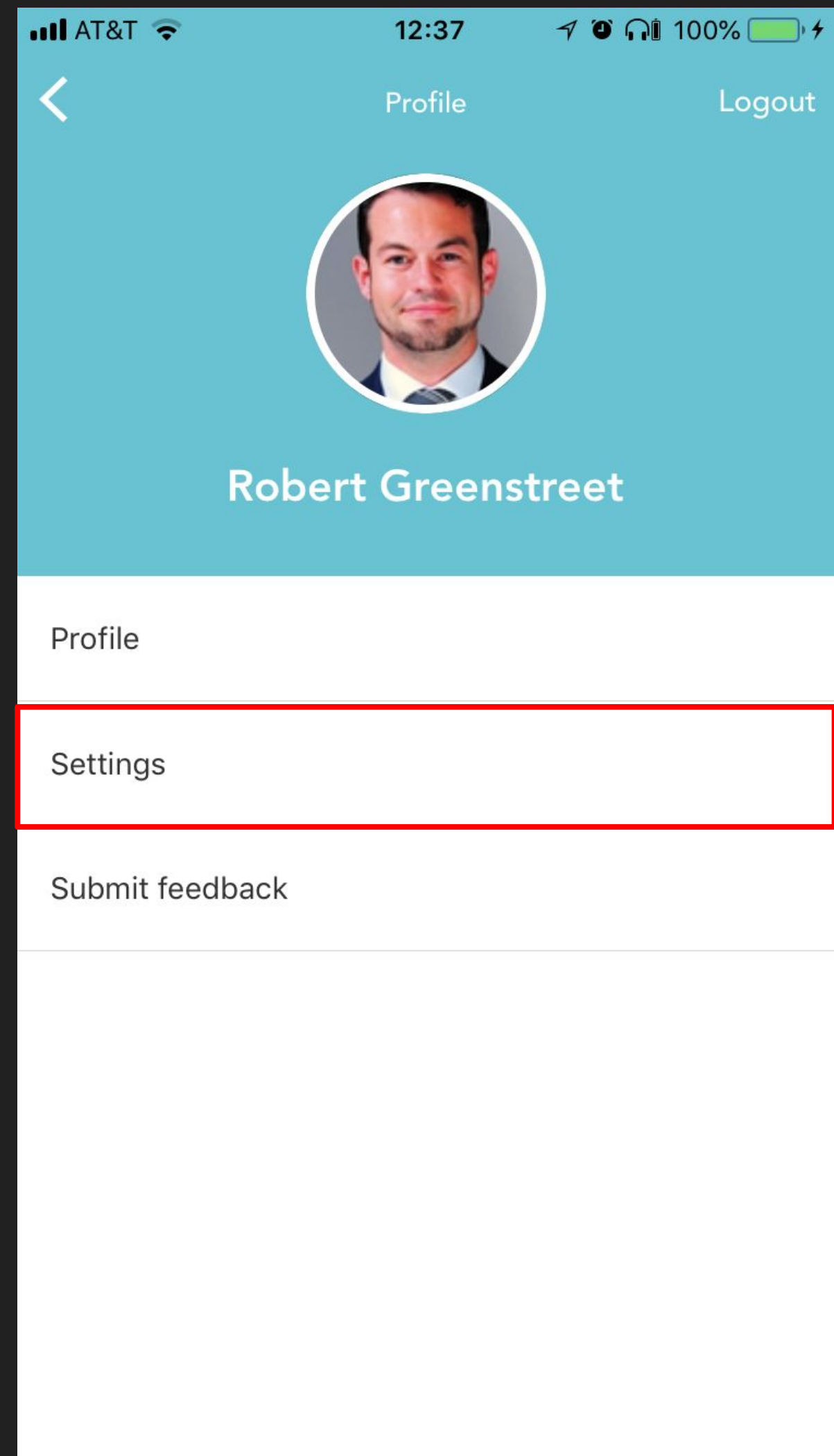
Tap the “Back” arrow in the top left



The screenshot shows a mobile application interface for a user profile. At the top, the status bar displays 'AT&T', signal strength, Wi-Fi, time '12:38', location, alarm, headphones, and 100% battery. Below the status bar, a blue back arrow is highlighted with a red box. The page title is 'Profile'. The profile section includes a circular profile picture of a man, the name 'Robert Greenstreet', and three red circular icons for phone, messages, and email. Below this, contact information is listed in sections: 'primary email' with the address 'robertgreenstreet@kw.com', 'primary phone' with '850-471-5000', 'mobile phone' with '850-361-2582', and 'location' with '1620 S Queen St', 'York PA 17403', and 'US'. A map icon with a house symbol and the number '83' is shown next to the location text. The word 'Legal' is visible in the bottom left corner of the map area.

Menu/Profile

Tap "Settings"



Menu/Profile

The only setting able to be changed is to enable "Listen for 'Hey Kelle'"

Note: A pause is required after "Hey Kelle" before saying the command



Voice/Text Commands

Use the text box just like you would a text message to ask Kelle to do things

You can also tap the microphone to start a voice command

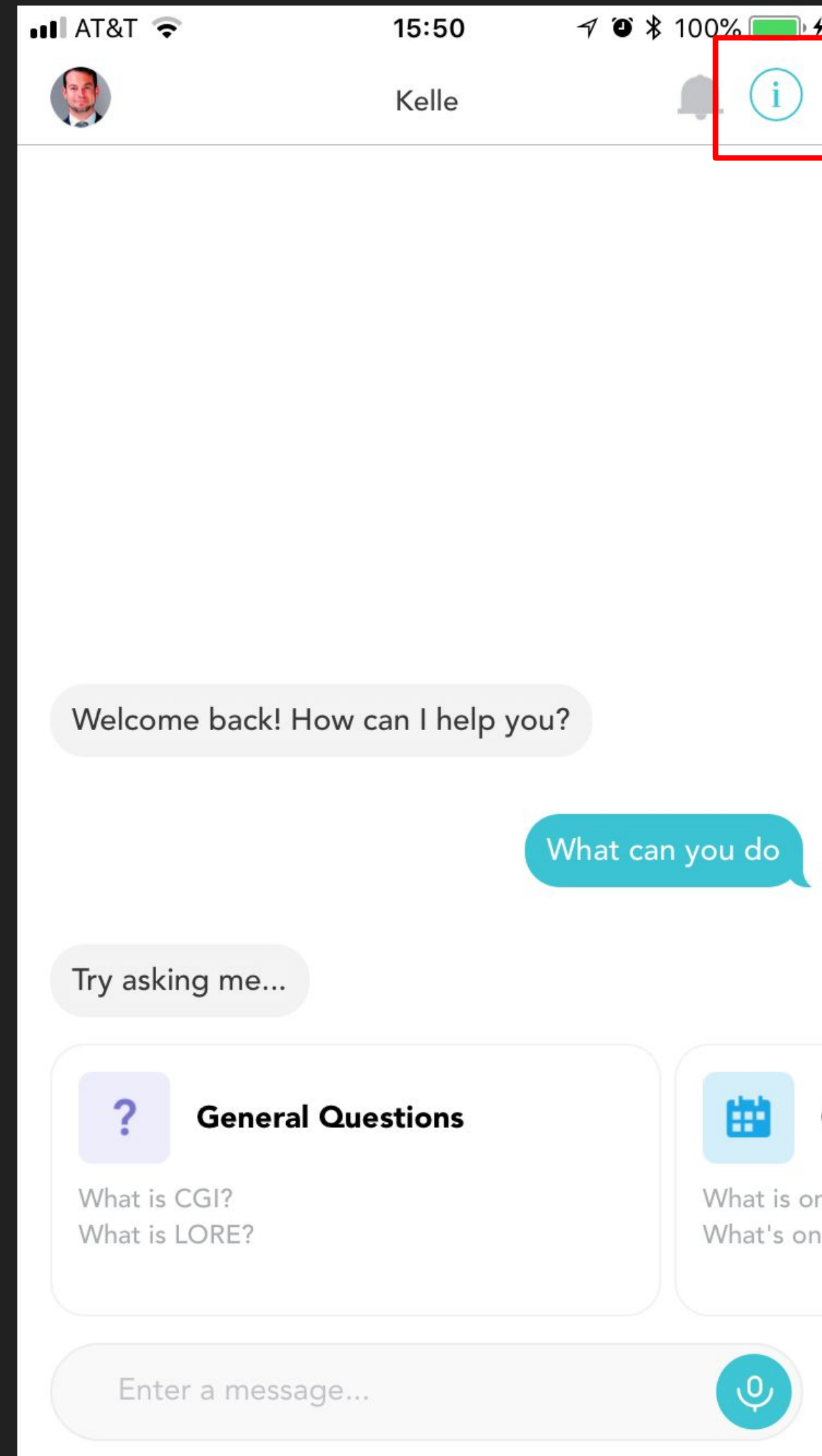
Or if you turned on “Hey Kelle”, say “Hey Kelle”, pause for her to start listening, and then your command



Types of Commands

To learn what types of things you can ask Kelle to do, open the “Information” menu at the top right

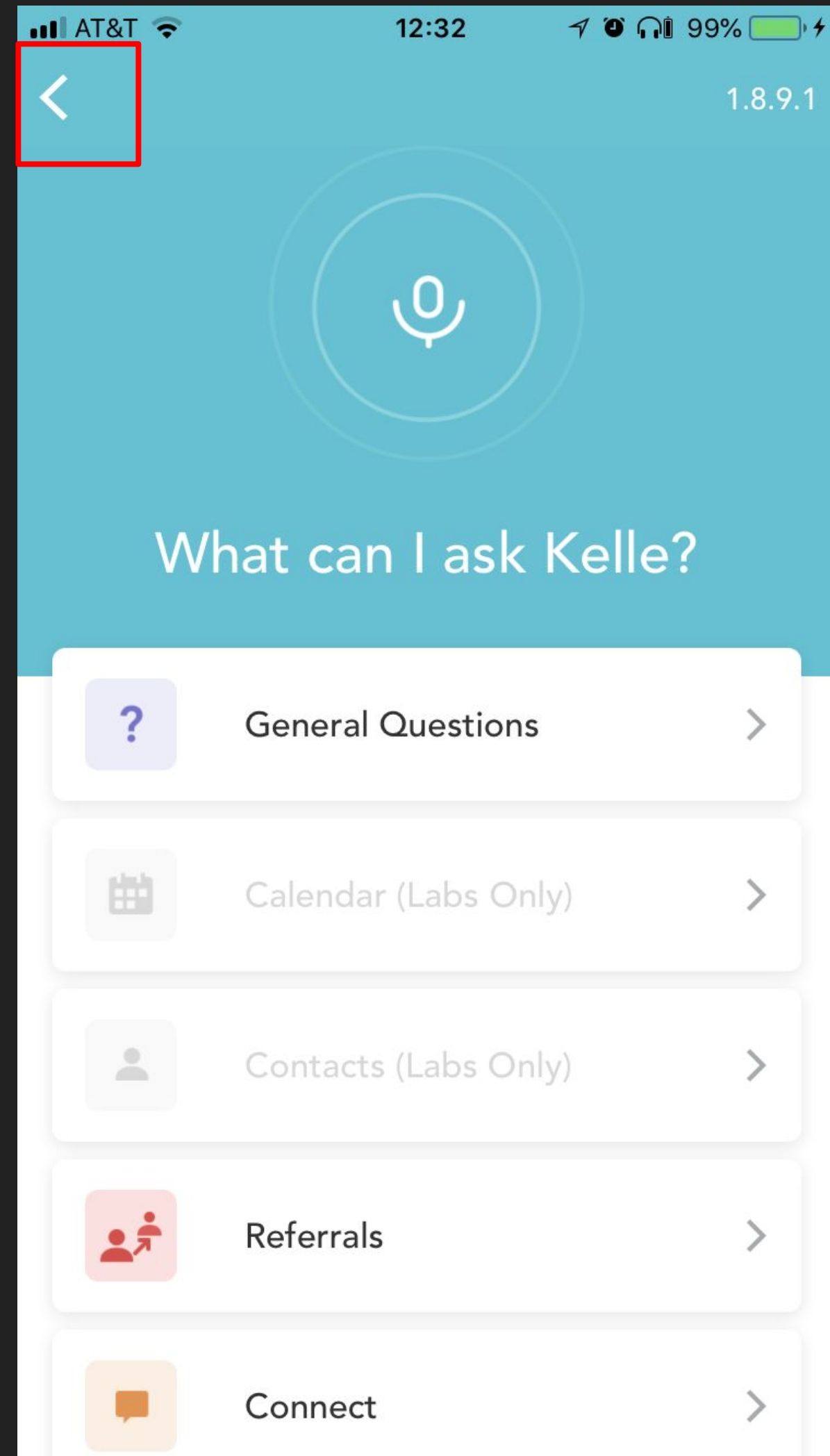
You can also ask Kelle “What can you do?”



Types of Commands

Tap any of the sections to open a list of the types of things you can ask Kelle, or ask her to do for you

Tap the back arrow to return to the home page



Notifications

See notifications from Kelle and your referrals in the “Notifications” section

Tap the bell icon next to the “Information” icon to open notifications



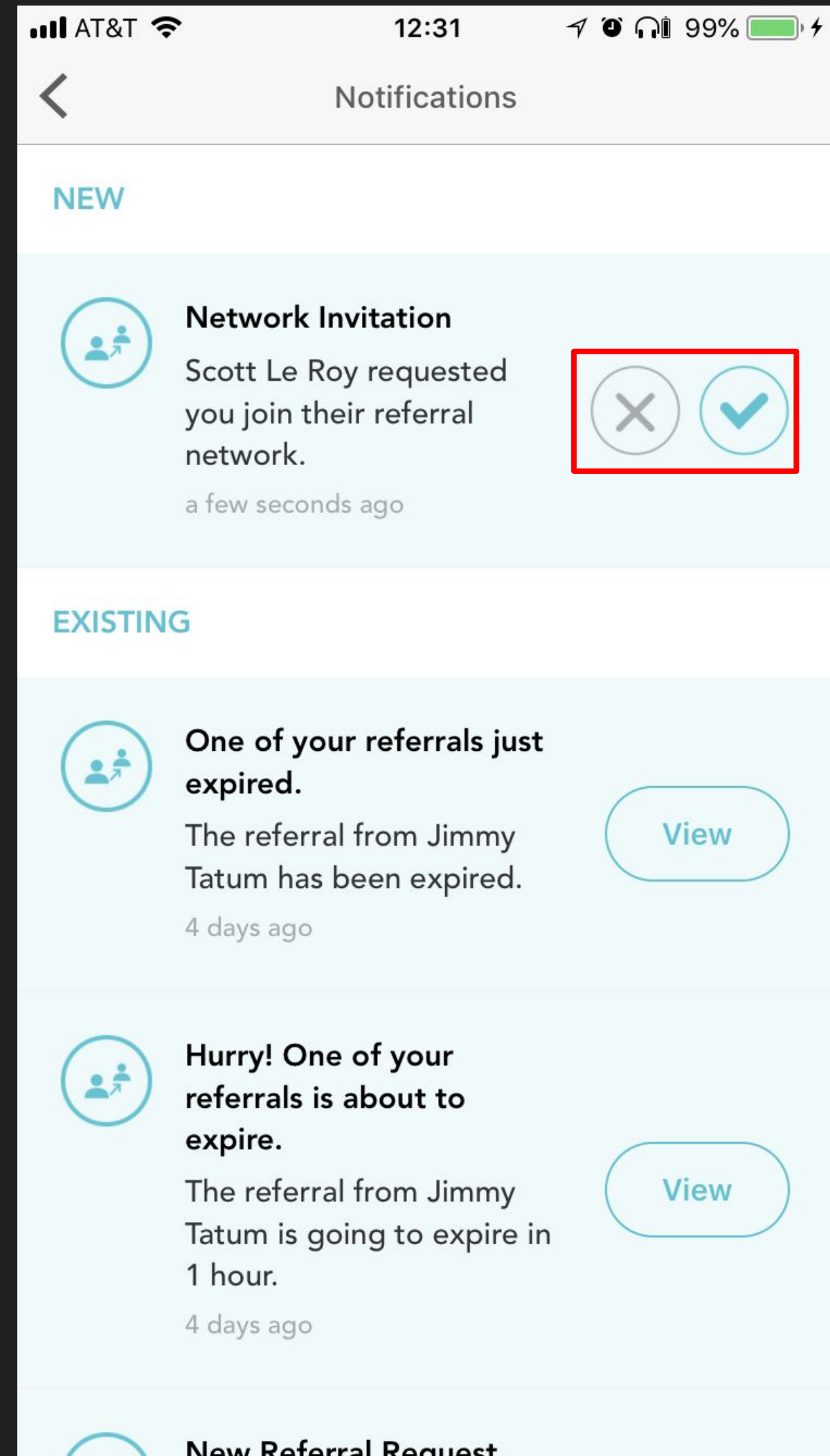
Network Invitations

In addition to an email notification, you will also receive a notification from Kelle when you receive a request to join someone's referral network

You can accept or deny requests here in Notifications

Note: Only accept referrals from people you believe you may actually send/receive referrals with

This is not a Social Media platform, you do not need to accept all invitations

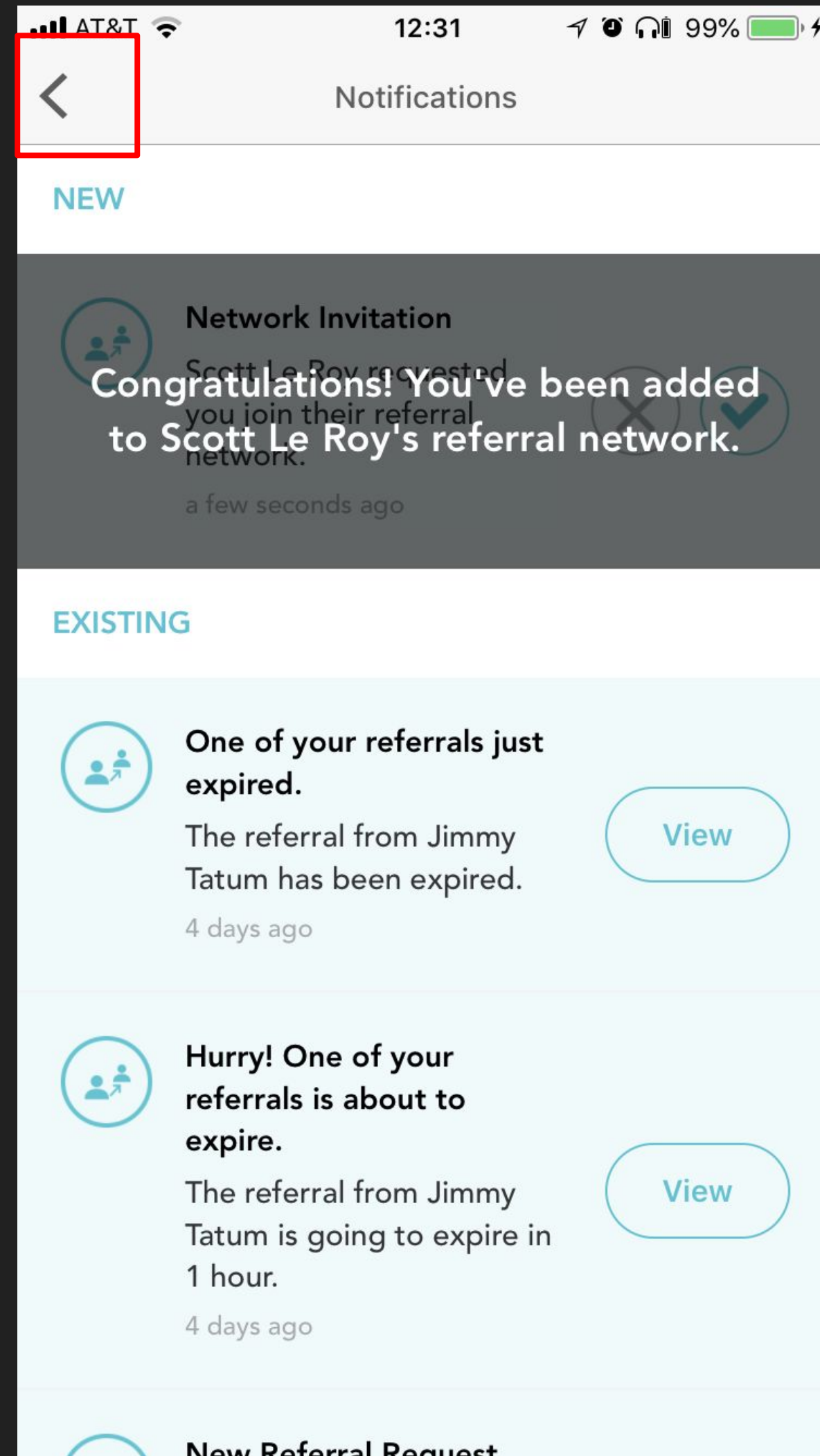


Accepting Referral Invitations

If you accept an invitation, Kelle will congratulate you

You will also receive notifications when your Referral Network requests are accepted/rejected

Tap the “Back” arrow to return to the home page

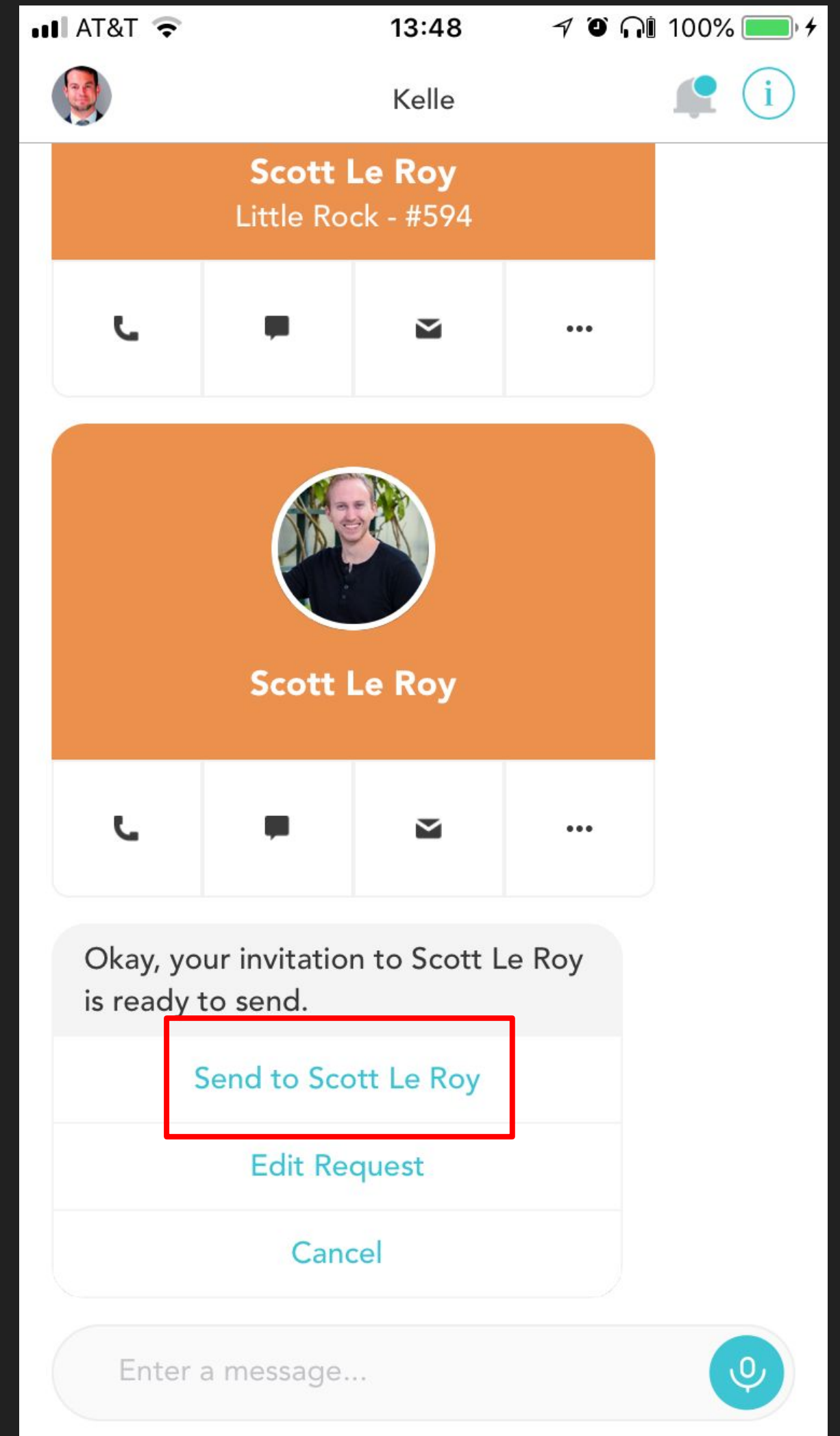
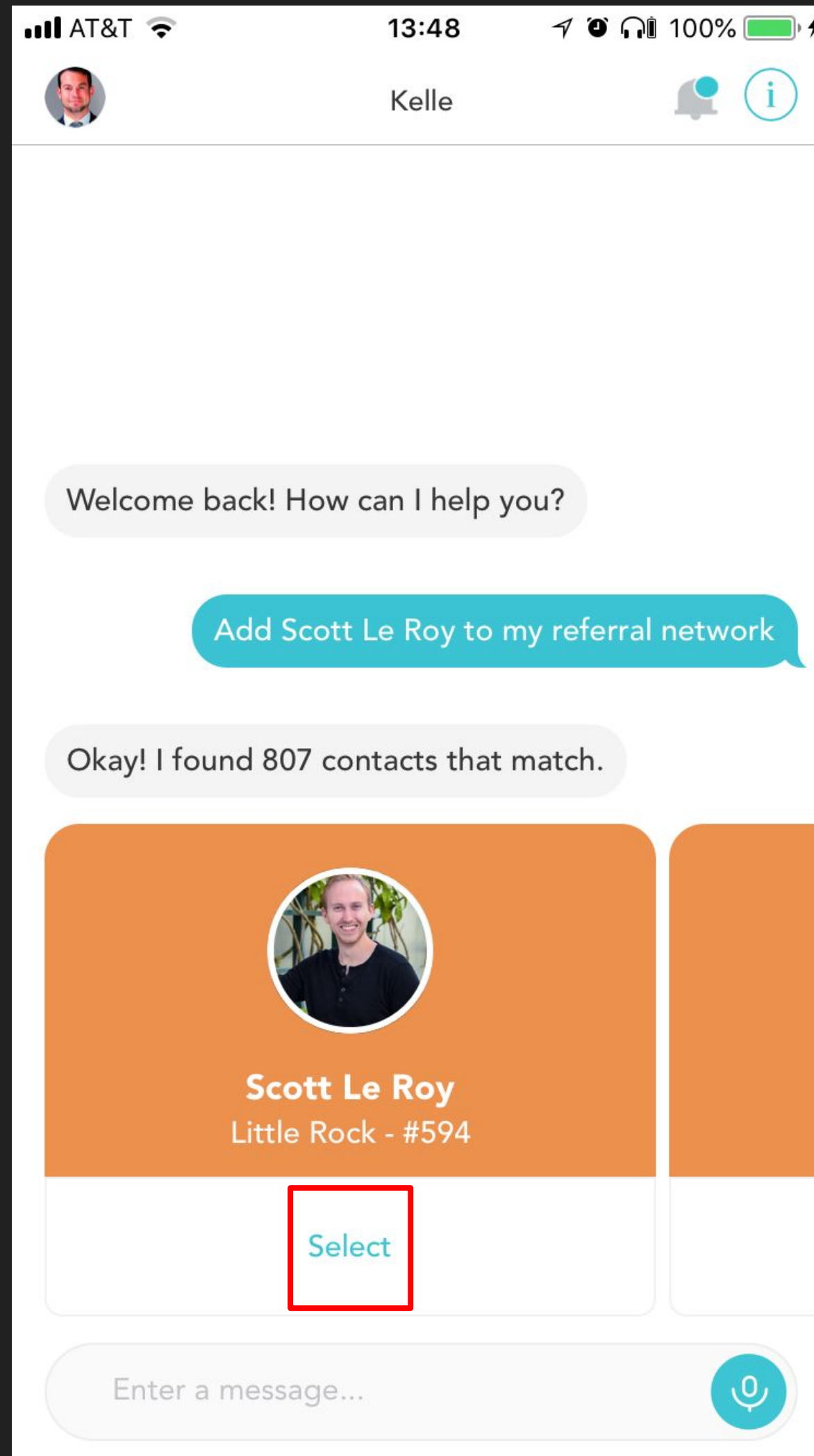


Adding To Your Referral Network

From the home page, type or say “Add [Name] to my referral network”

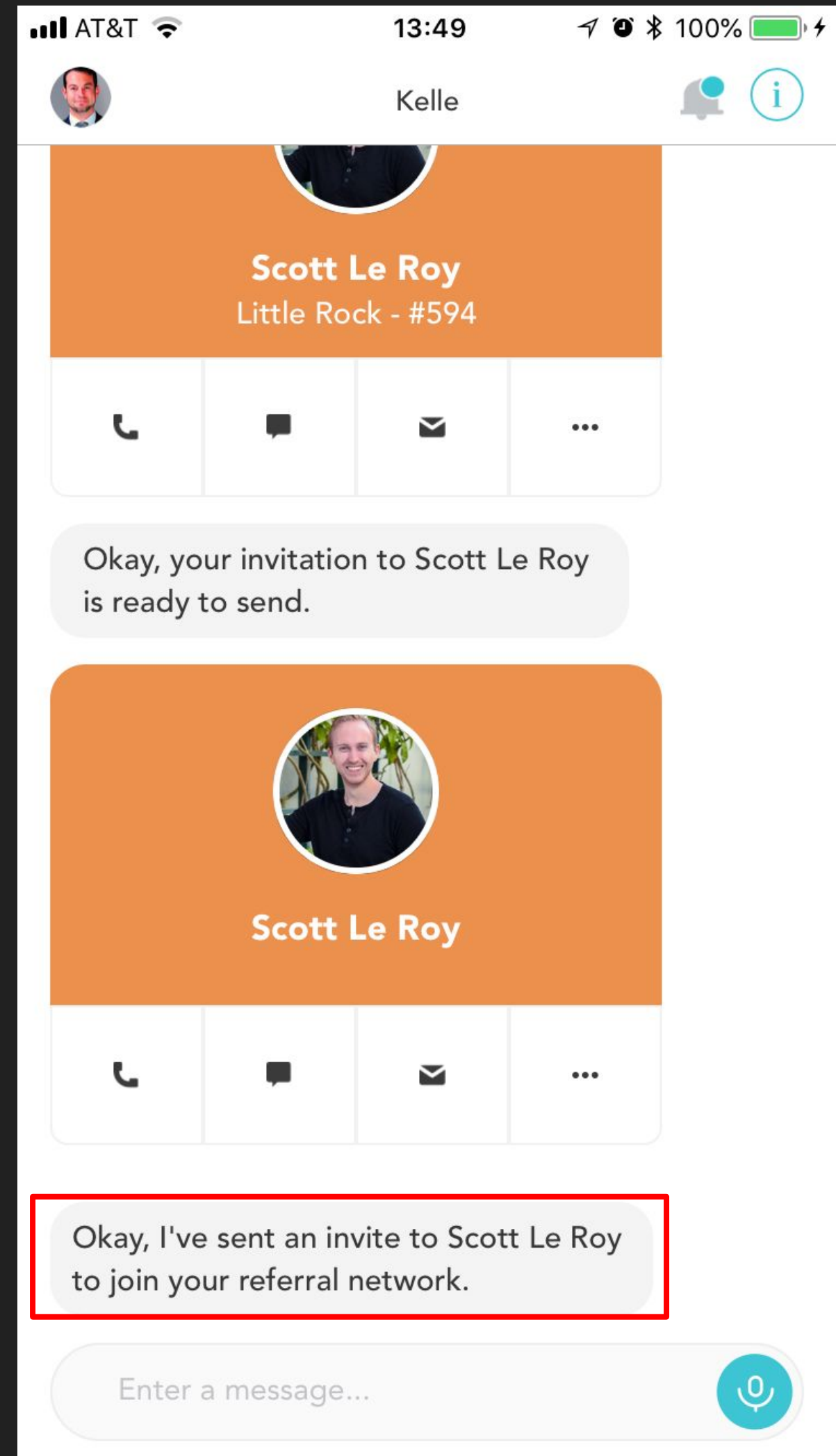
Then tap “Select” on the correct agent

Then tap “Send to [Name]”



Adding To Your Referral Network

If the agent accepts your request, you will receive an email notification and a notification from Kelle



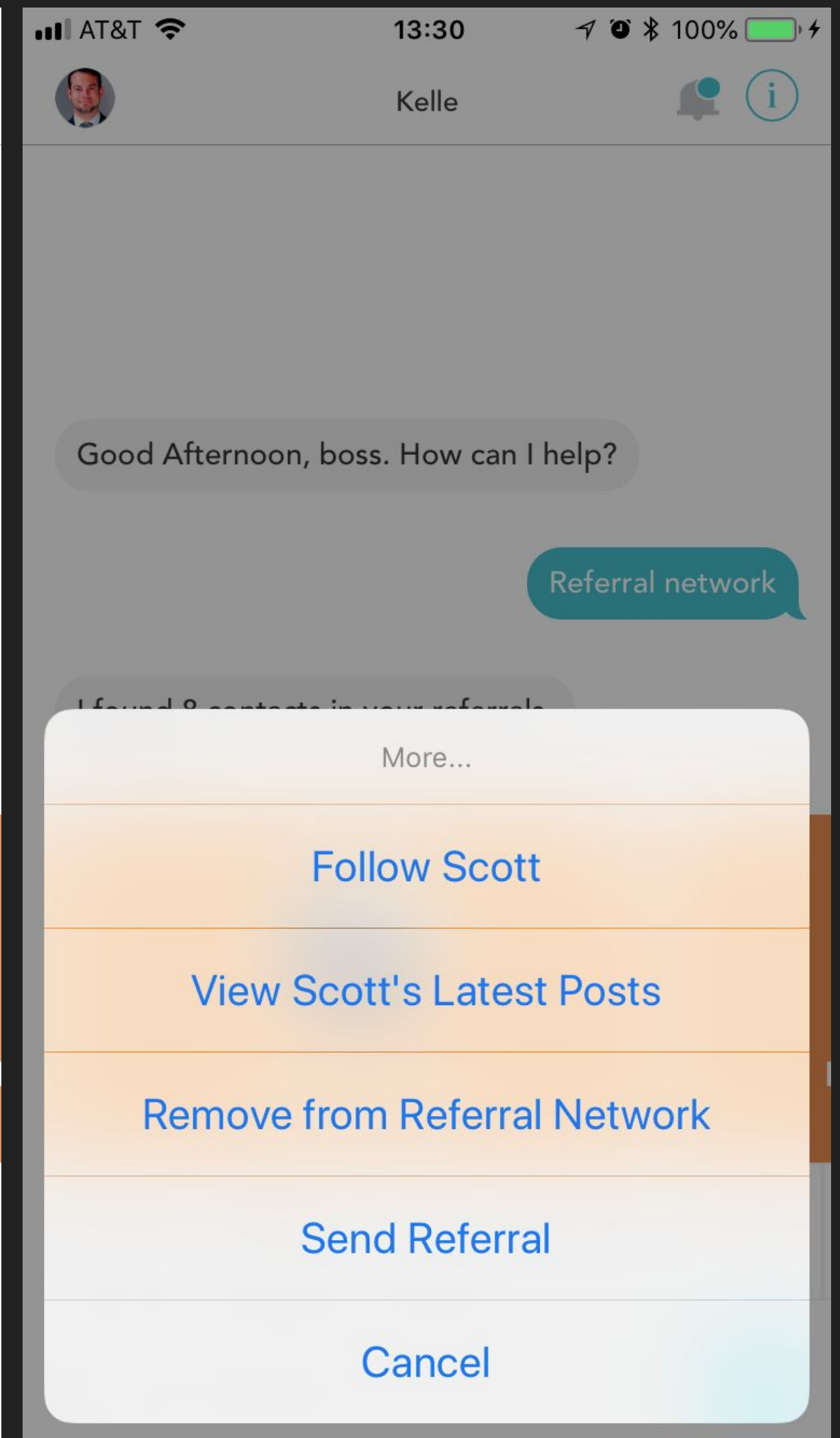
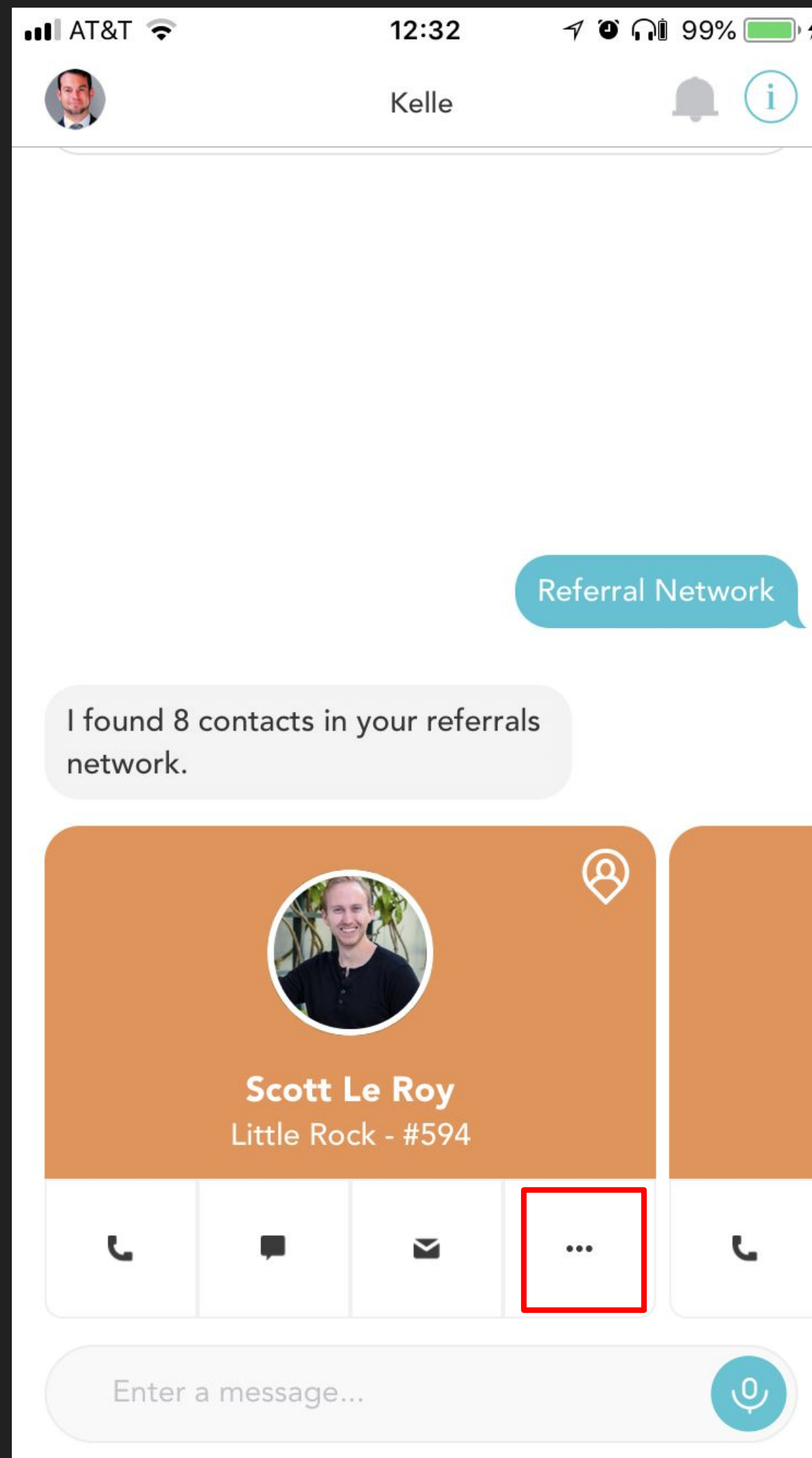
Displaying Your Referral Network

To show everyone currently in your referral network, type or say "Referral Network"

You can then scroll sideways through the people currently in your network

You can call, message, email, or view that agent's profile

You can also view/follow their KWConnect posts, remove them from your referral network, or send a referral



Viewing An Agent Profile


Tap on the agent's picture/name to view their Referral profile





You can see their start year, and any other statistics they choose to show on their profile: Closed units, volume, etc.

You can also contact them from within the profile

AT&T 12:32 99%

< Profile

 Scott Le Roy

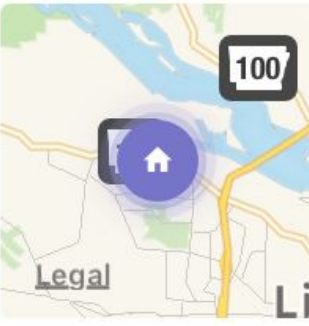
   

primary email
scott@scottleroymarketing.com

primary phone
[321-236-2568](tel:321-236-2568)


mobile phone
[321-236-2568](tel:321-236-2568)

location
12814 Cantrell Road
Little Rock AR 72223
US



AT&T 13:32 100%

< Profile

 0.0
Closed Units

About

Born in Dallas, TX, Scott has a prestigious degree from the University of North Texas. Graduating with honors, he is a member of Beta Gamma Sigma Marketing Fraternity, Golden Keys Honor Society, American Marketing Association, and the Sports Marketing Association.

After graduating Cum Laude, he traveled to Orlando, FL to continue his marketing...

[Read more](#)

Sending A Referral

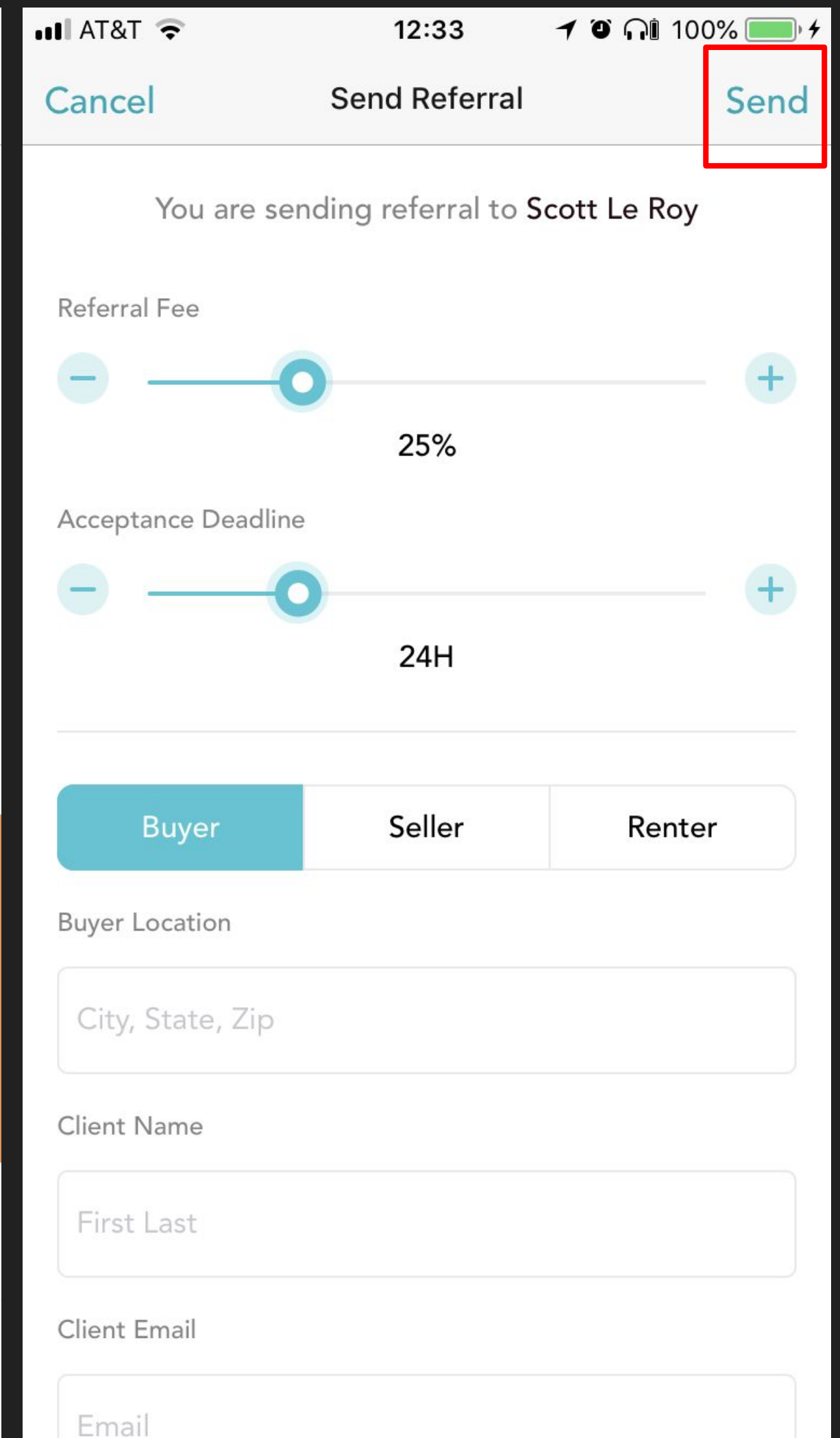
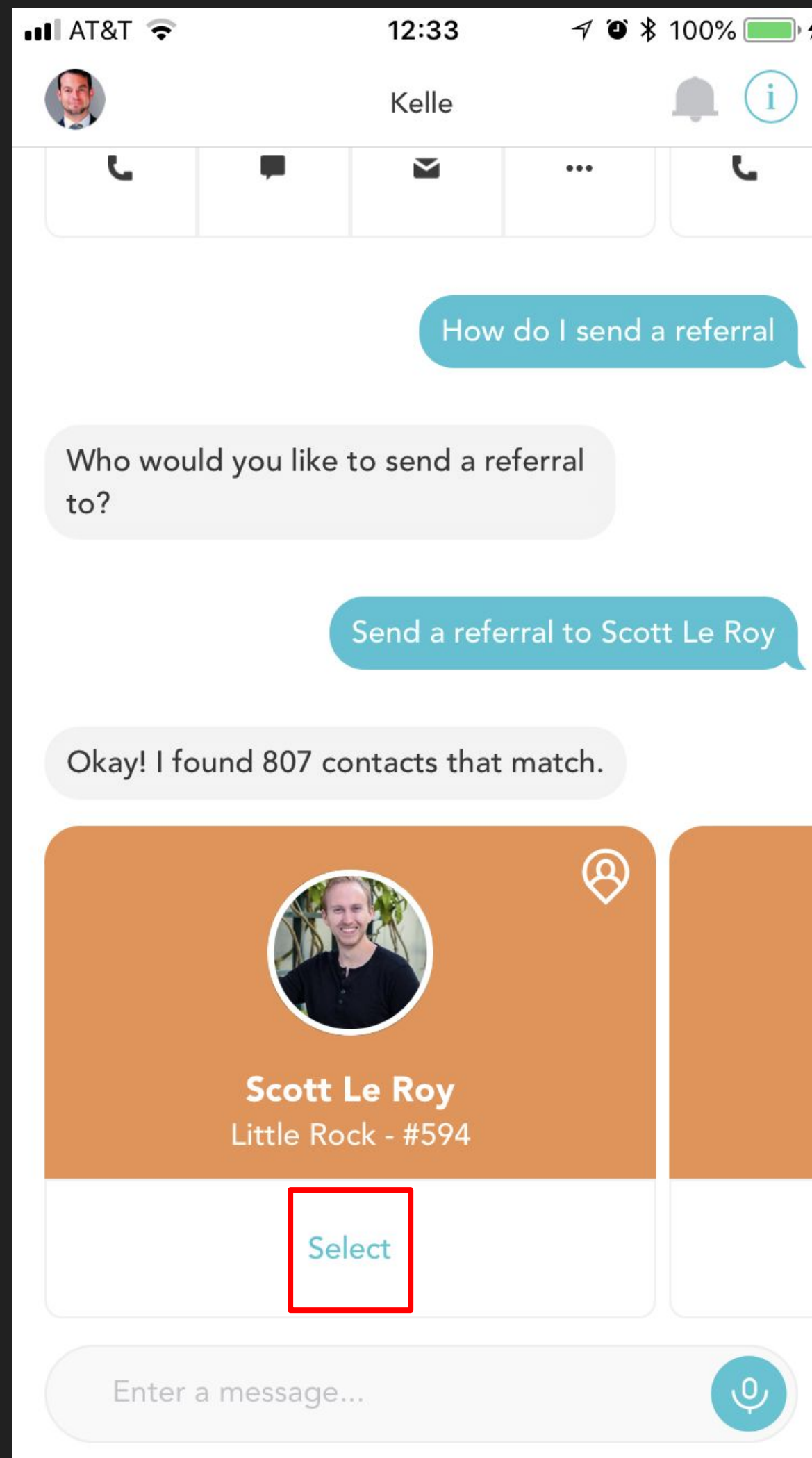
To send a referral to an agent already in your network, type or say “Send a referral to [name]”

Tap “Select” for the correct agent

Note: You can only send referrals to agents already in your referral network

Enter the referral information and tap “Send” at the top right

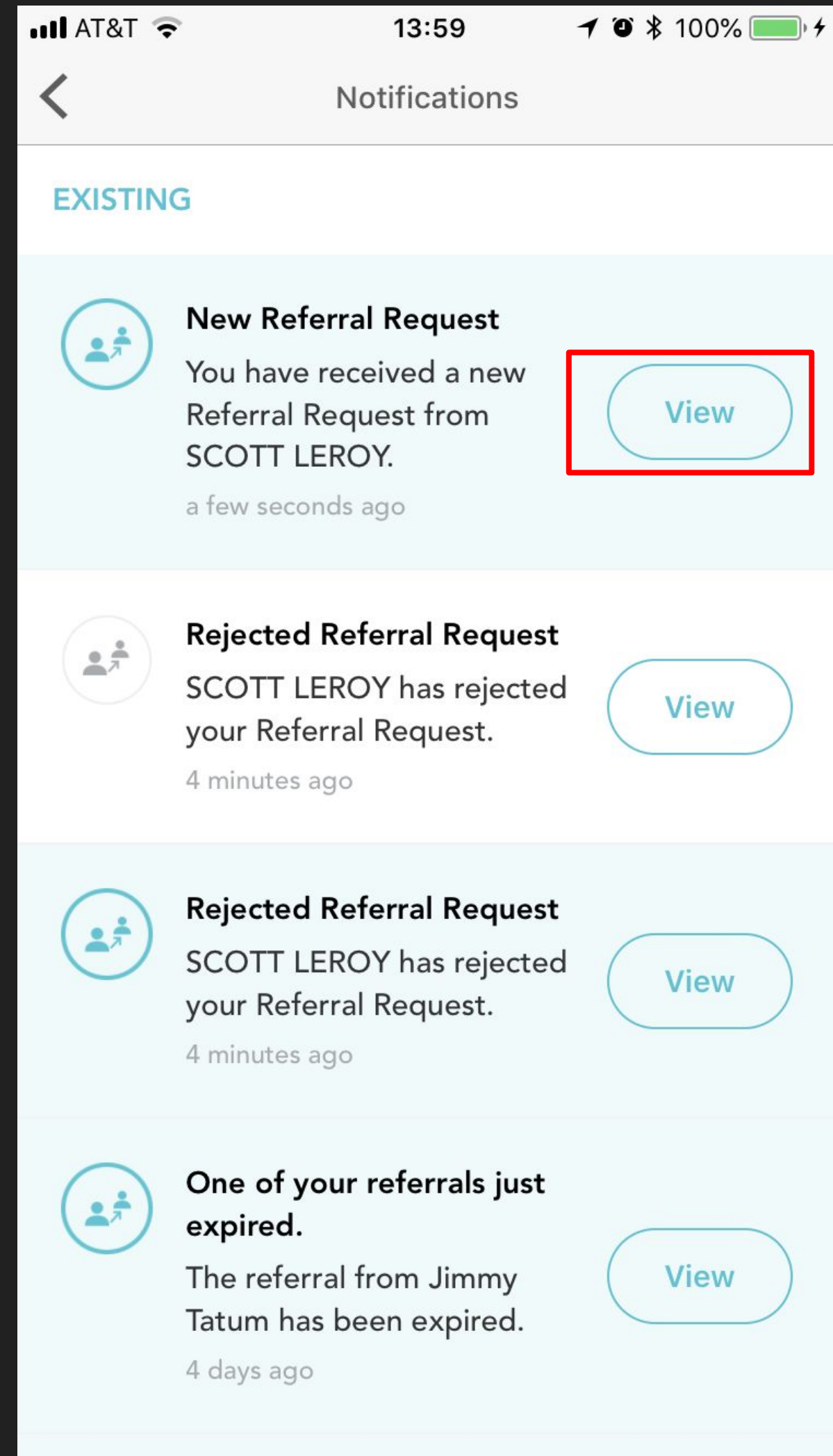
The form will let you know what is required



Receiving A Referral

When another agent sends you a referral, you will receive an email and a notification from Kelle

Tap “View” within “Notifications” to see the referral request




Accept, Counter, or Reject Referral

When someone sends you a referral, you have the option to Accept the Referral as is, Counter with a new referral fee, or Reject the Referral outright




AT&T 13:59 100%

Buyer Referral Activity Log

Unmatched



Scott Le Roy
AR, AR




Notes this is a test referral ▾

Lender Preapproved No

Price Range \$95,000.00 to \$250,000.00

Referral Fee 25%

Timeframe 3 Months

Accept Counter Reject

Accepting A Referral

If you choose to Accept the referral, you can send a note to the agent at the same time

Air Transfer 14:17 100%

Buyer Referral Activity Log

Accept Offer

Send a note to Scott Le Roy

Notes

Test acceptance

Accept

Cancel


Timeframe 3 Months

Accept Counter Reject

Air Transfer 14:17 100%

Buyer Referral Activity Log

Unmatched



Scott Le Roy

AR, AR

Call Message Email

Notes This is a test referral for... ▾

Lender Preapproved No

Price Range \$95,000.00 to \$250,000.00

Referral Fee 25%

Timeframe 3 Months

Accepted

Countering A Referral

If you Counter a referral, you can choose a higher referral fee, if desired, and decide how much time to allow for the other agent to accept, counter, or reject your counter

AT&T 14:01 100%

Buyer Referral Activity Log

Counter Referral

Adjust the referral fee and select an acceptance deadline to send a counter offer.

Referral Fee 27%

Acceptance Deadline 47 Hours

Notes

Test counter


Counter

Cancel

AT&T 14:01 100%

Buyer Referral Activity Log

Unmatched



Scott Le Roy
AR, AR

Call, Chat, Email icons

Notes: this is a test referral to... ▾

Lender Preapproved: No

Price Range: \$95,000.00 to \$250,000.00

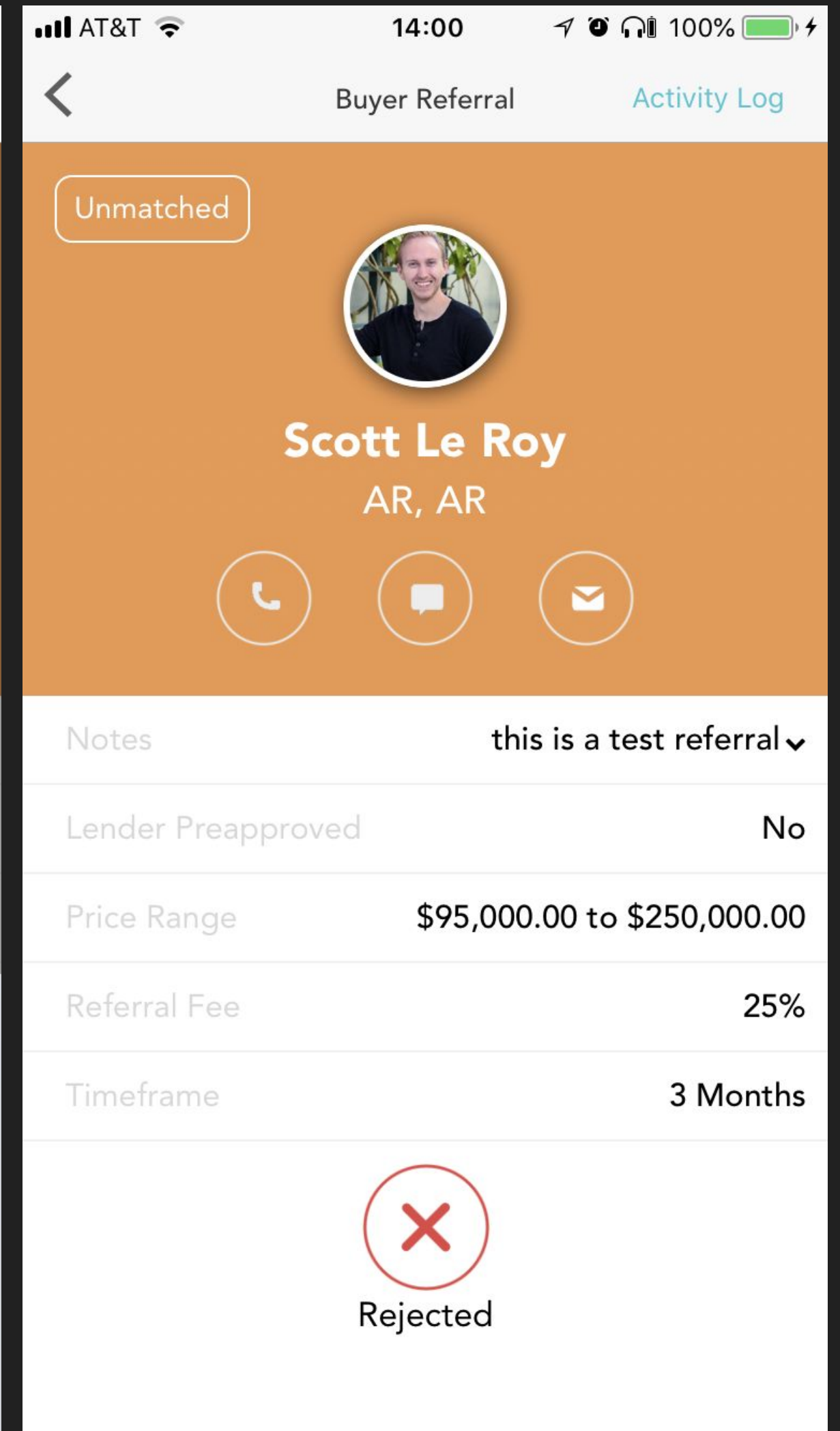
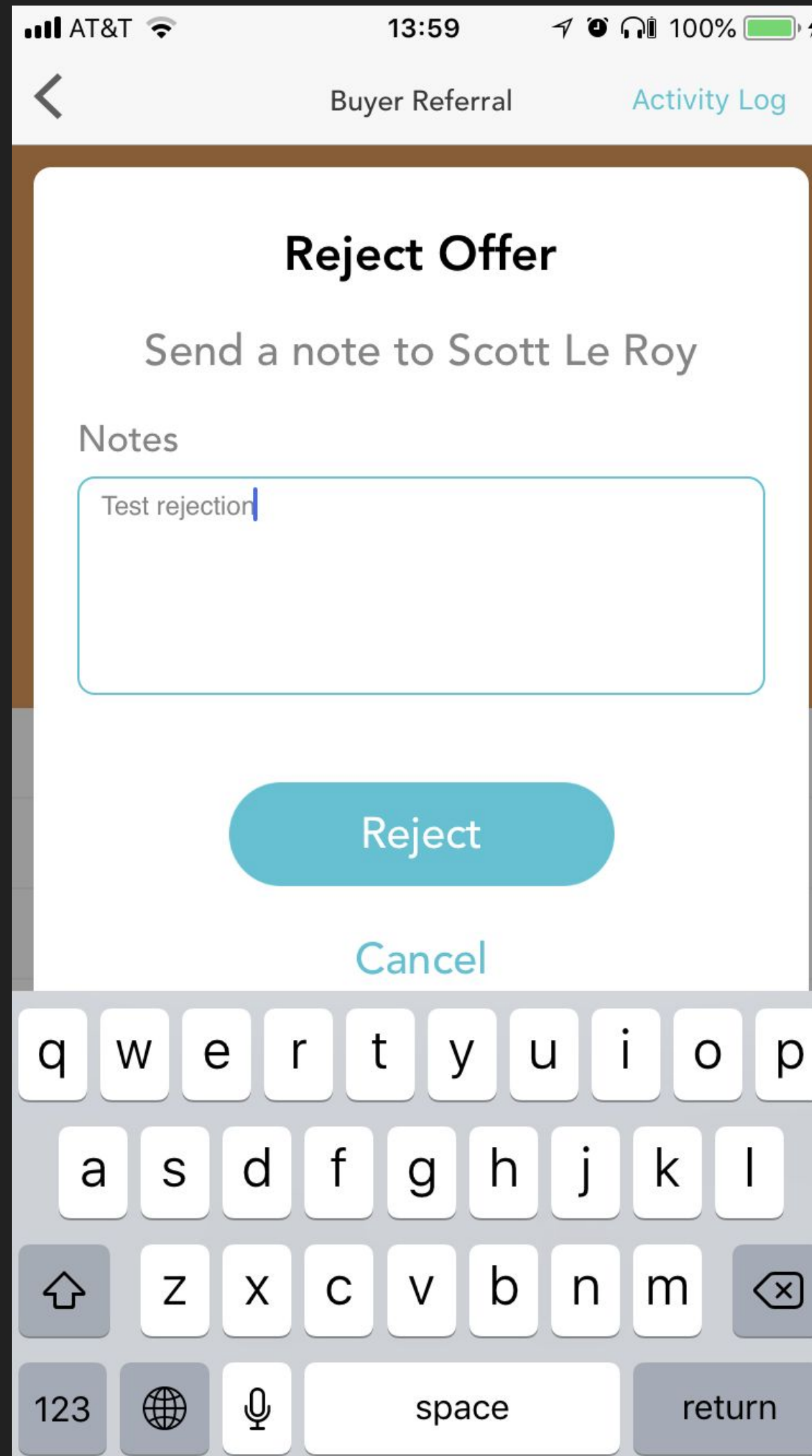
Referral Fee: 25%

Timeframe: 3 Months

Countered

Rejecting A Referral

If you decide to Reject a referral, you can send a note along with it

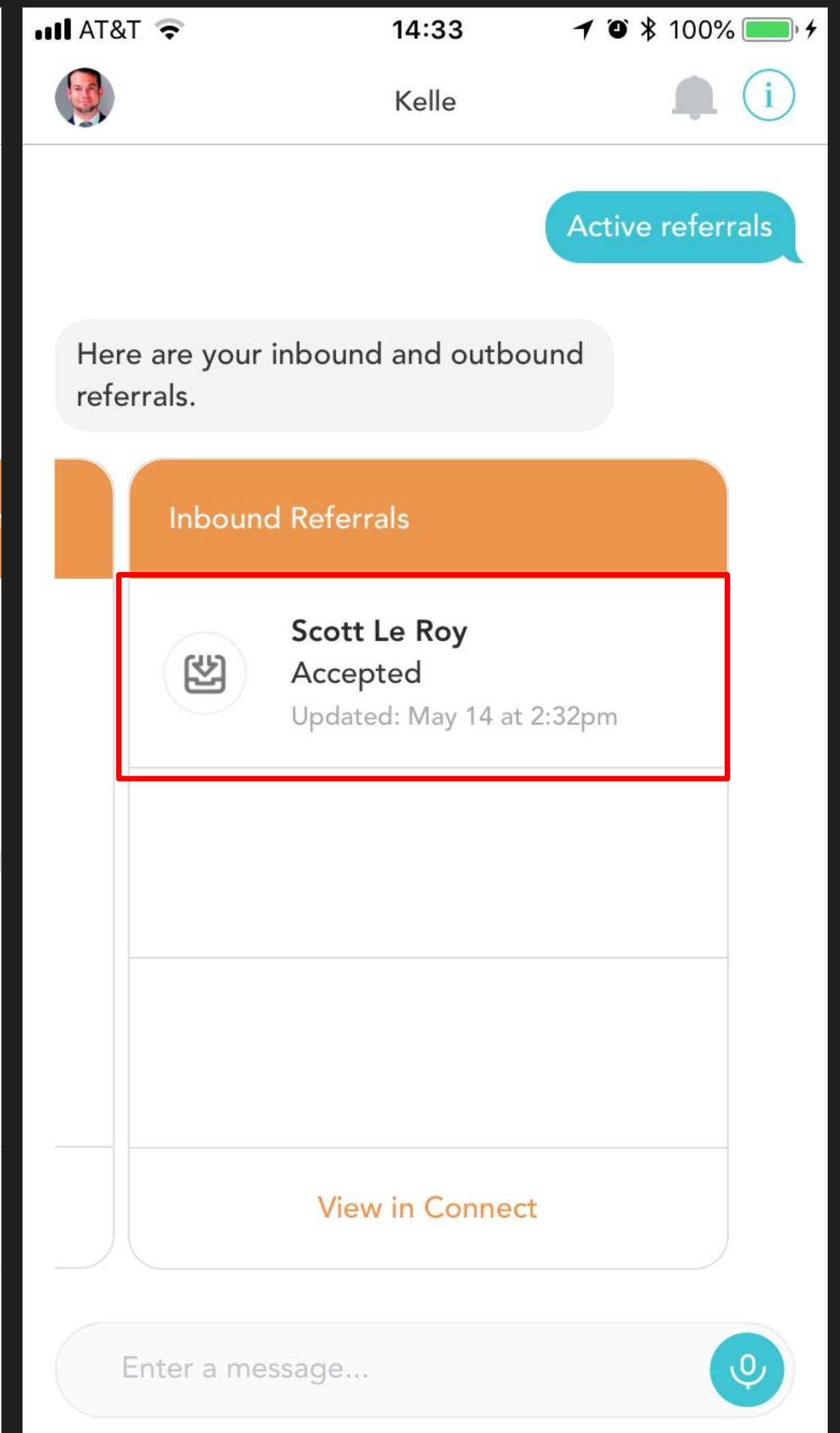
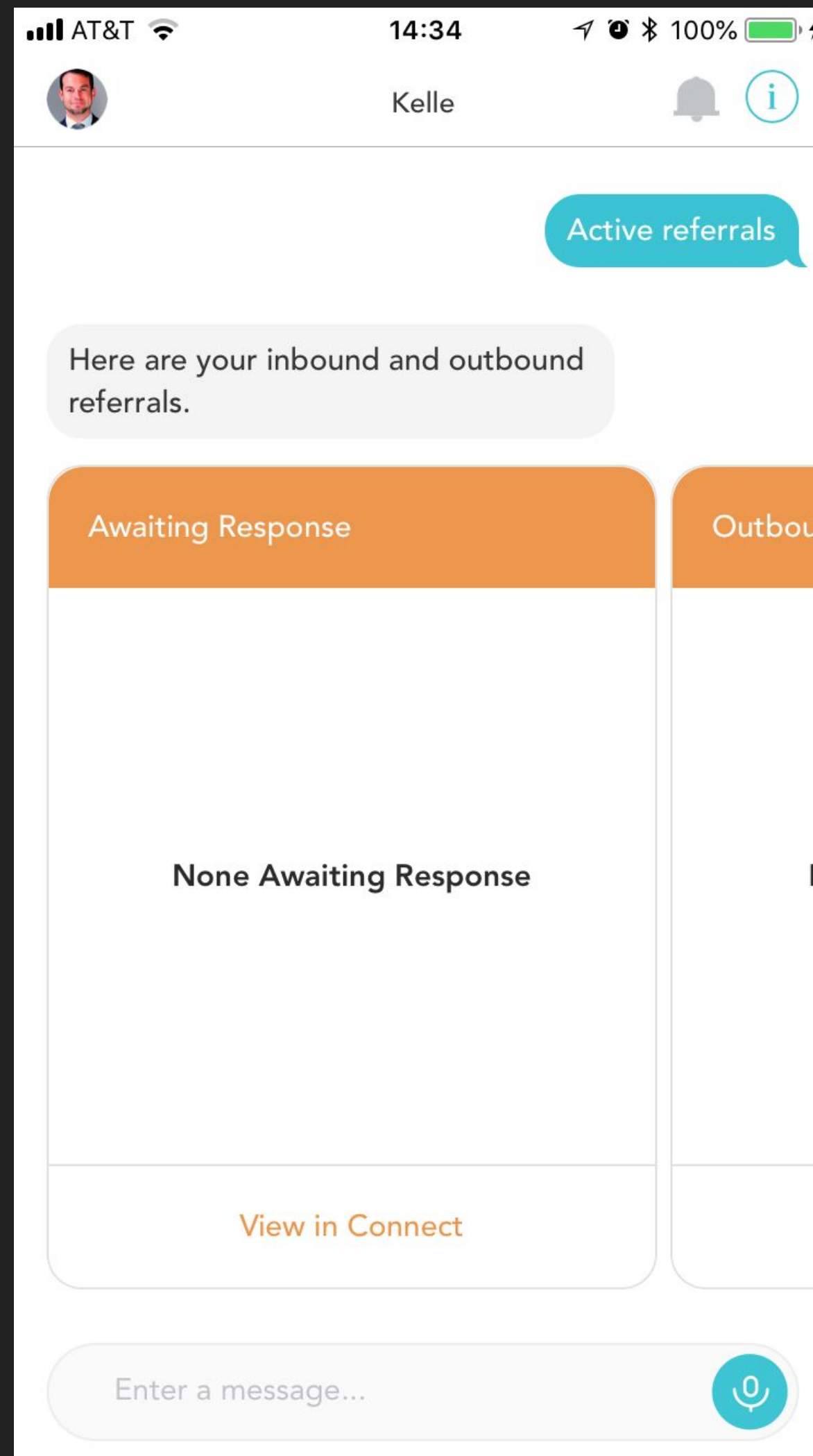


Viewing Active Referrals

To view referrals you are currently working on, type or say “Active Referrals”

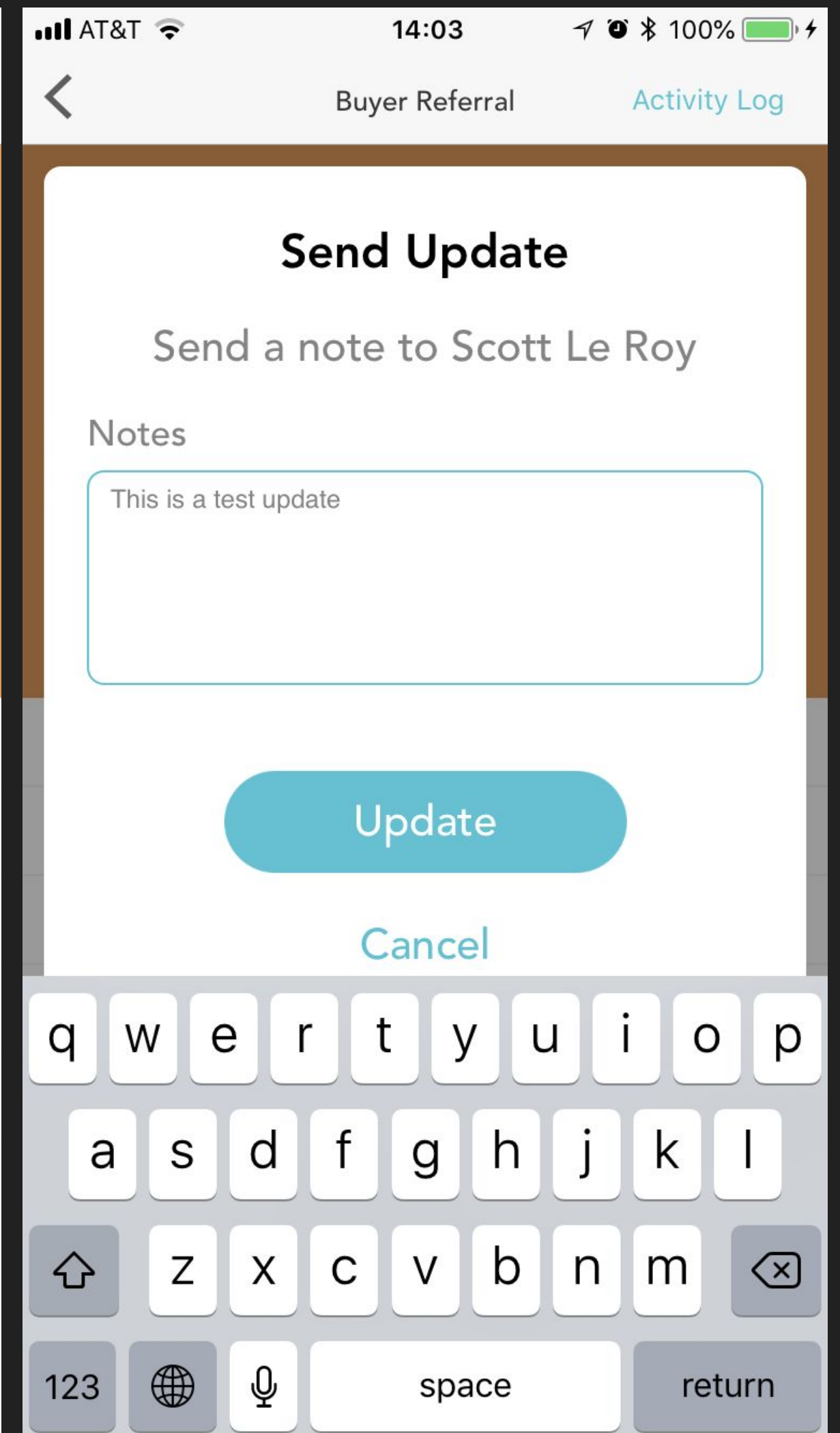
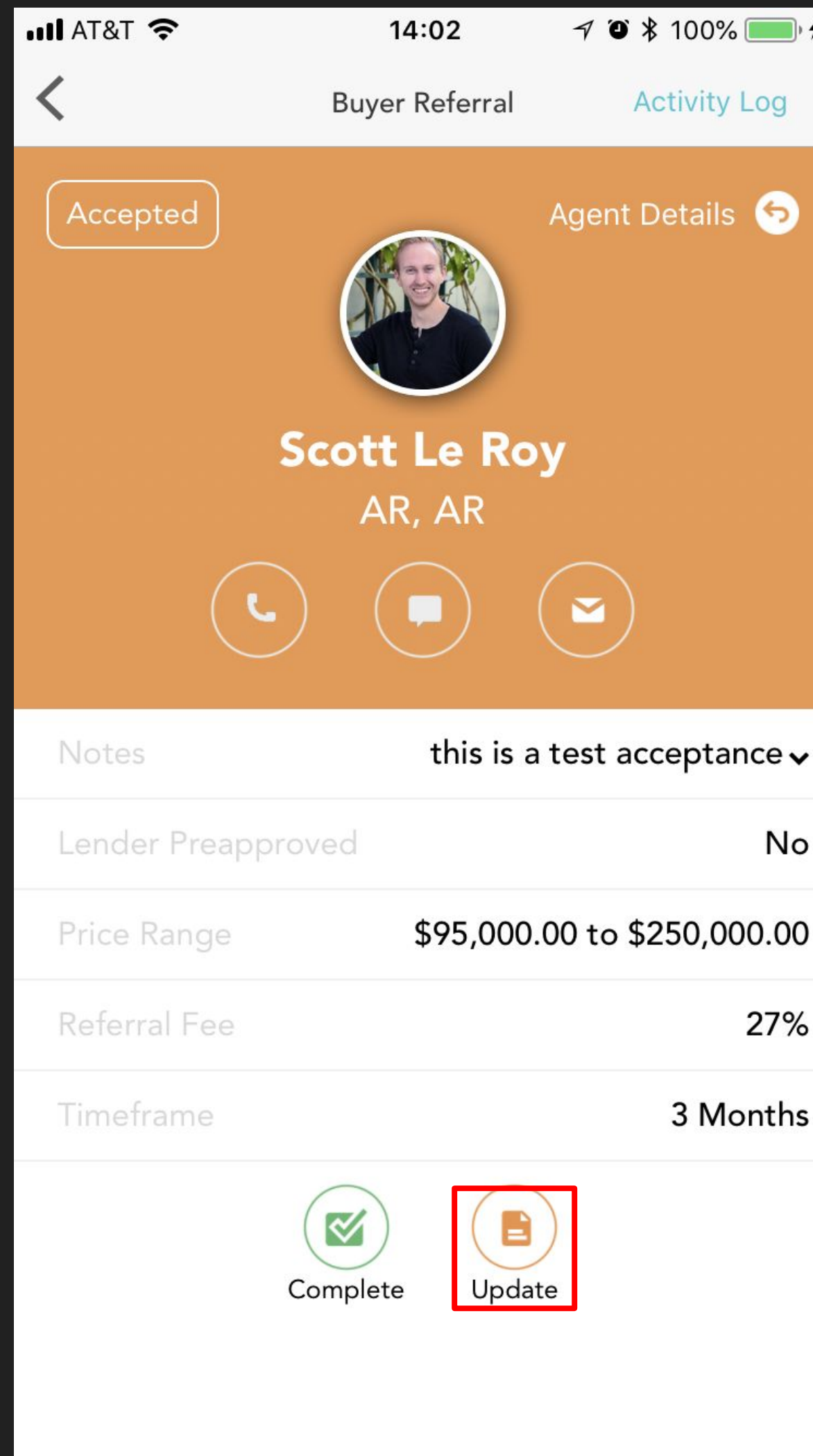
Swipe between “Awaiting Response”, “Outbound Referrals” or “Inbound Referrals”

Tap the referral you want to view



Updating An Accepted Referral

You can notify the referring agent of updates in the deal by opening the referral and tapping "Update"



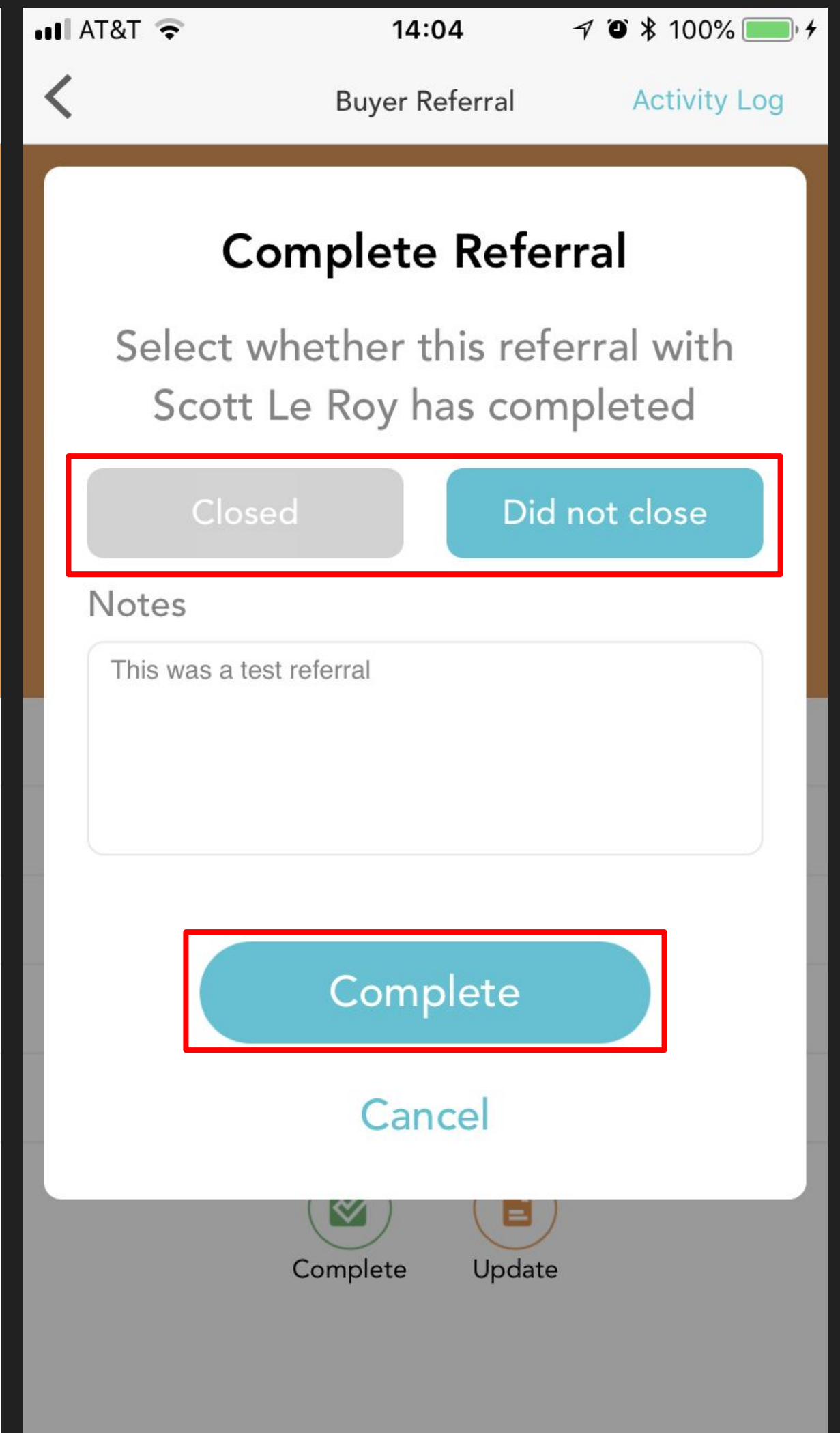
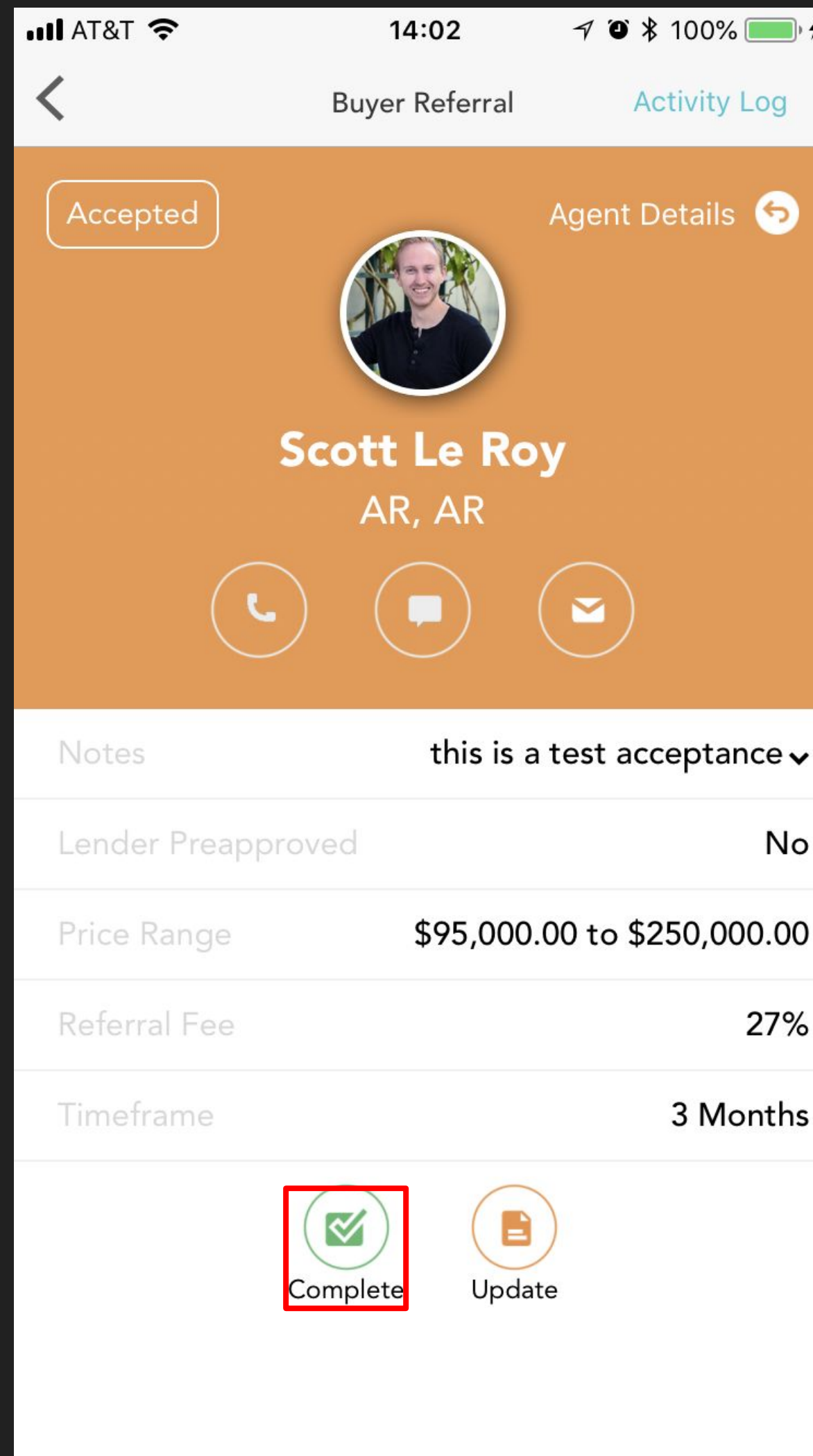
Closing/Completing A Referral

Once a referral closes, or doesn't close, you will want to "Complete" the referral

Open the referral's info and tap "Complete"

Choose "Closed" or "Did not close" and enter an optional note

Tap "Complete"




Viewing a Referral's Activity Log

AT&T 14:02 100%

Buyer Referral **Activity Log**

Accepted Agent Details



Scott Le Roy
AR, AR

Phone, Messages, Email

Notes: this is a test acceptance

Lender Preapproved: No

Price Range: \$95,000.00 to \$250,000.00

Referral Fee: 27%

Timeframe: 3 Months

Complete Update

AT&T 14:04 100%

Activity Log

- Lost**
This was a test referral
May 14, 2018
- Updated**
This is a test update
May 14, 2018
- Updated**
This is a test update
May 14, 2018
- Accepted**
this is a test acceptance
May 14, 2018
- Countered**
Test counter
May 14, 2018

Upcoming features

Currently unavailable/only available to Labs participants

- Add contact to database
- Set reminder for contact
- Add item to calendar
- Show neighborhood information from Nextdoor.com