

## Publish a SmartPlan


Mylea Smith - 2021-07-02 - Smart Plans

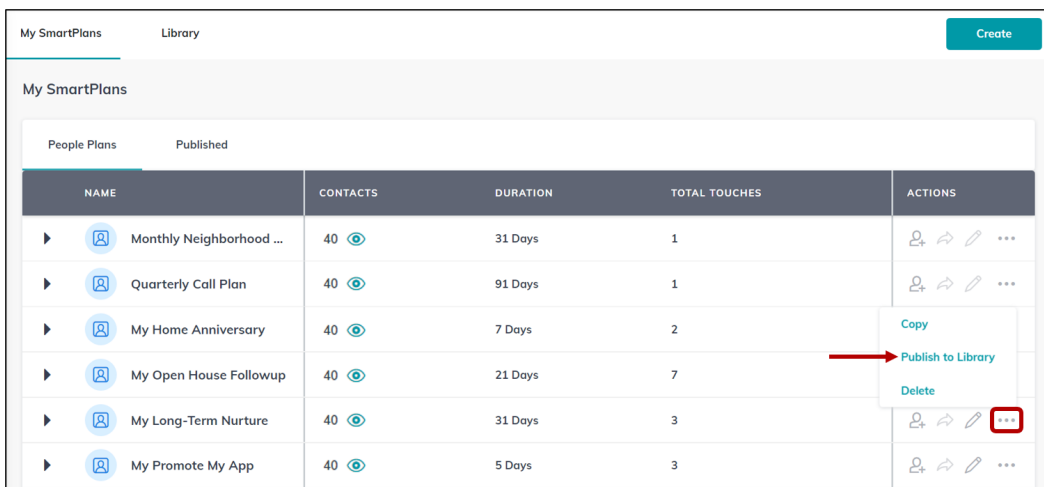
SmartPlans is the applet that allows us to automate our business. Through SmartPlans, you can create custom task checklists, automatically set phone call reminders, send automatic emails and texts, and you can customize the timing of all of this.

Now, we have the ability to create awesome SmartPlans and publish them to the shared SmartPlans Library in Command. Once published, KW associates will be able to see who the publisher is and give published SmartPlans a rating, using a 5 star rating system. Anyone who has access to Command will then be able to download your published SmartPlan and start using it in their own business.

- [Click here](#) to learn how to create a custom SmartPlan.
- [Click here](#) to learn best practices for publishing SmartPlans.

To learn how to publish a SmartPlan, follow the steps below:

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. Find the SmartPlan that you want to publish, click the **three dots**, in the Actions column, and choose **Publish to Library**.



My SmartPlans		Library			Create
My SmartPlans					
People Plans		Published			
NAME	CONTACTS	DURATION	TOTAL TOUCHES	ACTIONS	
▶  Monthly Neighborhood ...	40	31 Days	1		
▶  Quarterly Call Plan	40	91 Days	1		
▶  My Home Anniversary	40	7 Days	2	Copy Publish to Library Delete	
▶  My Open House Followup	40	21 Days	7		
▶  My Long-Term Nurture	40	31 Days	3		
▶  My Promote My App	40	5 Days	3		

4. If you have included any "Add to SmartPlan" steps in your custom SmartPlan, you will

need to publish each SmartPlan that is included in the workflow. The system will take you through each linked SmartPlan and have you publish.

- If you included a Keller Williams default plan, these are automatically published. Click **Next**, at the top of the page.

The screenshot shows the 'Publish to the Library' interface for a plan named 'Monthly Neighborhood Nurture'. The plan is already published, as indicated by the 'PUBLISHED' status. A red box highlights the 'Next' button at the top right. The form includes fields for 'Plan name\*' (Monthly Neighborhood Nurture) and 'Price' (free). Below these is a 'Description\*' field with a placeholder text: 'This is a monthly email that helps you reach out to clients, leads, or recruits to show real time market data, specific to their neighborhoods.' There are three task steps: '#1 | Send Email | Monthly Neighbor...', '#2 | Set Delay | 30 Days', and '#3 | Restart Flow | Repeats Unlimited...'. On the right side, there is a 'SUMMARY OF LINKED SMARTPLANS' section with a list of linked plans: 'My Long-Term Nurture', 'Monthly Neighborhood Nurture' (highlighted with a blue box), 'Quarterly Call Plan', and 'Paul's 15 Connections Plan'. Each linked plan has a status icon (checkmark or circle).

- If you included a custom SmartPlan, you will need to **add a description** for the linked SmartPlan and click **Publish**, at the top of the page.

The screenshot shows the 'Publish to the Library' interface for a plan named 'Paul's 15 Connections Plan'. A red box highlights the 'Next' button at the top right. The form includes fields for 'Plan name\*' (Paul's 15 Connections Plan) and 'Price' (free). Below these is a 'Description\*' field with a placeholder text: 'This 15 connections plan is meant to be used in conjunction with my Long Term Nurture plan. These 15 connections are meant to be used as a way to keep top of mind with past clients, which will run along with the other touch points in the main plan.' There is one task step: '#1 | Make a Call | Call [contact.first...'. The 'Task Name\*' field contains a call action with variables: 'Call ([contact.first.name] [contact.last.name] - [contact.phone])'. On the right side, there is a 'SUMMARY OF LINKED SMARTPLANS' section with a list of linked plans: 'My Long-Term Nurture', 'Monthly Neighborhood Nurture', 'Quarterly Call Plan', and 'Paul's 15 Connections Plan' (highlighted with a blue box). Each linked plan has a status icon (checkmark or circle).

5. Finally, **add a description** for the main SmartPlan you are about to publish, then click **Publish**.

← Publish to the Library

My Long-Term Nurture Publish

Plan name\*  Price

Currently, all plans will be complimentary in the Library.

Description\* Stay top of mind by scheduling regular check-ins with your contacts over the span of one year. There are several plans linked in the workflow, which all work together to build this great long-term nurture plan.

#1 | Add to SmartPlan | Monthly Neighbor... Day: 1 ▾

#2 | Set Delay | 10 Days Day: 1 ▾

Almost there! Fill in the description for your main SmartPlan. Follow best practices to ensure the plan works best for everyone.

SUMMARY OF LINKED SMARTPLANS

- My Long-Term Nurture
- Monthly Neighborhood Nurture
- Quarterly Call Plan
- Paul's 15 Connections Plan

Now your SmartPlan will be fully published for anyone in Command to utilize. You will be able to see your published SmartPlans by clicking the Published tab, on the My SmartPlans dashboard.

My SmartPlans Library Create

My SmartPlans

People Plans Published

NAME	PUBLISH DATE	DOWNLOADS	RATING	ACTION...
Facebook Lead Conversi...	Jun 23, 2020	0	★★★★☆ 3.5/5	
Paul's 15 Connections PL...	Jun 24, 2020	0	★★★★☆ 3.5/5	
My Long-Term Nurture	Jun 24, 2020	0	★★★★☆ 3.5/5	

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