

BEFORE YOU BOOK · PRIVATE

What to Expect From a Confidential Call.

A 30-minute private conversation about your real estate career. No pitch. No follow-up pressure. No contact with your current brokerage. Here's exactly how it works.

AUDIENCE

Agents who are curious about a conversation but want to know the shape of it first.

AARON HEARD · KW SUCCESS

kwsuccess.com

WHY THIS EXISTS

What the call is — and isn't.

I get a lot of inbound conversations from agents who are quietly evaluating their career — usually somewhere between curiosity and the early stages of an actual move. They almost always want a real conversation. Almost none of them want to be "recruited."

So this is what the call is — and what it isn't.

What it is:

- A structured 30 minutes about your career, your model, and what's working or stuck.
- An honest read on whether your current environment is building you forward or quietly plateauing you.
- A coach's perspective from a decade of teaching agents in the Portland metro.
- Time you can use however you want — bring questions, bring a problem, or just bring curiosity.

What it isn't:

- A recruiting pitch. I don't pitch on these calls. If KW Portland Central isn't the right fit for you, we both find out faster this way.
- A sales call. There's no second call scheduled at the end unless you ask for one.
- A trap. We never contact your current brokerage, team leader, or manager about your interest in us.
- Transactional. This isn't where you bring a buyer or seller question — please call your current agent for that.

BEFORE THE CALL

The pre-qualification form.

Before our calendar opens up to you, we ask a short form. It exists for two reasons: to make sure I route you to the right person, and to give us a starting point so the first 5 minutes of the call aren't "so, tell me about yourself."

What we ask:

- Your name and email. Required so we can confirm the call.
- Your current role — agent, team leader, broker, considering the industry.
- Your current brokerage — we use this to make sure I'm not double-booked with someone you work with closely.
- Your market — Portland metro, Vancouver WA, somewhere else.
- What you'd like to talk about. One sentence is enough. "Curious" is a fine answer.

What we never ask:

- Your current production numbers, GCI, or cap status.
- Your splits, fees, or financial details with your current brokerage.
- Whether you've signed any specific agreements.
- References from your current office.

THE 30 MINUTES

How the call actually goes.

I keep these tight on time. 30 minutes is enough to have a real conversation — not enough to drift into a sales presentation.

Opening — minutes 0 to 5.

Quick intros, a 60-second read on your situation in your own words, and a check on what you'd like to walk away with. I usually ask one of: "What brought you to look right now?" or "What's the question that's been sitting with you?"

Middle — minutes 5 to 25.

The actual conversation. This usually lands in one of three places: a coaching question (a model, a hire, a stuck deal), a market read (what's actually happening in our metro), or a brokerage-fit conversation (what I'd look for in your shoes, whether KW Portland Central is or isn't a match for what you're solving). I'll be direct. You should be too.

Close — minutes 25 to 30.

Two questions: "What was useful?" and "What, if anything, do you want as a next step?" Most calls don't end with a scheduled follow-up. That's intentional. If the conversation was useful, you reach back out when you're ready. If you want to come visit the office, sit in on a training session, or have me connect you to two of our newer agents privately, I'll set it up.

AFTER THE CALL

What happens — and what doesn't.

We treat the call as a one-time conversation unless you ask for more. That's a deliberate choice and it's the part most people are surprised by.

No follow-up sequence.

You don't get added to a recruiting drip. You don't get a "just checking in" call from me a week later. If you want a follow-up, you reach out. If you don't, the conversation ends where we left it.

Your notes are private.

What you share on the call is visible only to me — not to KW Portland Central staff, not to leadership, not to anyone. Specifics are not shared with my office without your explicit permission.

You can request a summary.

If a written recap of what we discussed would be useful — for a coach, a partner, a peer roundtable — just ask at the end and I'll send one within 24 hours.

Your data is handled per the privacy policy.

Read the full policy at kwsuccess.com/privacy. Short version: we keep what we need to deliver the call, we don't sell anything, and you can ask us to delete your record at any time.

Ready when you are: kwsuccess.com/book-a-call/. The pre-qualification form takes about a minute. Calendar opens immediately after. Calls run Monday through Thursday.

KW SUCCESS

A network of high-performing real estate brokerages.

Today: KW Portland Central. Tomorrow: more.

KW PORTLAND CENTRAL

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WHEN YOU'RE READY TO TALK

A 30-minute confidential call. Pre-qualified, off-the-record, and never shared with your current brokerage.

kwsuccess.com/book-a-call/

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