Table of Contents

TRAINING
#1

Courtesy
Russ Orchard

TRAINER NOTES

Share story of a real process someone you personaly know went through buying a home.

Getting The Appointment

Buyers who buy?	Buy
Buyers who don't buy?	Don't buy
What is it that buyers who buy, buy?	Every relevant step
What is the first relevant step?	Appointment

Build the A-B model

What gets in the way of getting an appointment?
Make a list of reasons

Go over the Buyer/Seller process.

Percolation — Info Gathering — Active

Why should someone meet with you?

- Answers should include: I am honest, I will do a better job than anyone else…)

What is the purpose of getting the appointment?

Give me a list of reasons to have an appointment.

Talk about prospecting on two parallel tracks

Relationship stuff

Look for opportunity to get appointment

TRAINER NOTES

How long have you lived in the area?
Where did you move from?
How did you choose this area?
If you were to move, where would you go next?
When would that be?

If you were to buy/sell who would you use?
I want to be that person…
I want to build the relationship now…

If you were sick, who would you call? If you needed a dentist, who would you call? If you had a real estate need who would you call? I want to be that person. I want to develop a relationship with you so that if you have a need you will call me.

I work with my clients at their pace….I don't want to push you into something or be perceived as be pressuring you into something .

I am not a pushy sales person…

Have you had a chance to sit down and talk with someone about what is happening in the real estate market?

What we need to do is spend 45 minutes to an hour so that I can walk you through the buying/selling process and hear what it is you would like to accomplish.

JBJ script

Demonstrate getting a floor call or sign call

What time?
Which time?
How soon?
When?
Where?

TRAINING
#2

30 min

TRAINING APPOINTMENTS

ITS FEAR

Remember, when you put off your calls, it's fear.

False
Evidence
Appearing
Real

What false evidence have you created being real?

List them on the easel

Examples: Too late to call; Too early; Open houses don't work; I don't feel well; I'll do it tomorrow.

Get real ones from the cluster.

BITE THE BULLET

What is the worst that can happen - If you don't make your calls you don't have appointments, no appointments, no relationships, no relationships, no money.

1. List five experiences you will feel by not making calls
2. Now find the assumption about you.
3. Say it out loud to group
4. Rewrite the assumption.
5. Say the new affirmation out loud.

ROLE PLAY SCRIPT

Confirm calls

Quantum Home Tour™ leads

Floor calls

IDEAS

*Play any tapes you have with agents making appointments

*Managers demonstrate how easy it is to make appointments by getting on the telephone.

*Share any fears

AGENTS WHO DO - DO

Just do it - *if you're scared*

Just do it - *if you're embarrassed*

Just do it - *if you don't know what to do*

JUST DO IT

TRAINING
#3

QUANTUM HOME TOUR™
RELATIONSHIPS GAME
SURVEY TO APPOINTMENTS

PURPOSE

The purpose of this training is to assist agents in being more effective in making appointments at Quantum Home Tours™

CLASSROOM TRAINING EXERCISE

Your job is to create an exercise to develop their skill set in listening to key need(s) and asking for the appointment. Condition is set up to train in smaller or larger groups.

OBJECTIVE

Interpret the need and ask for the appointment.

SECONDARY OBJECTIVE

To develop a skill set to get into relationship.

SET UP

1. Clear chairs-line along the walls
2. Have them group into pairs
3. Have their clipboard
4. Have survey
5. Strips of paper with KEY NEED
6. Explain the exercise

ROLE PLAY

DIRECTIONS

1. Have them pair up. They will walk in a circle around the room. One person will be the “Agent” and one person will be the “Customer”. The person playing the “Agent” will have a clipboard and a survey. The strip of paper that has been folded with the KEY NEED goes to the “Customer”.

2. The person role playing the "Agent" does not get to see the paper. The object is for the “Agent” to do survey. When the agent thinks they know the KEY NEED they will ask for the appointment for a drop off of STUFF of the KEY NEED.

3. If they do not guess the KEY NEED when asking for the appointment, the “Customer” will not make the appointment and continues Probing™ until they get the KEY NEED.

4. Once this is accomplished they switch roles and they turn in the piece of paper and get a new one.

MOTHER-IN-LAW QUARTERS	RANCH STYLE-NO STAIRS
DETACHED GARAGE-ARTIST STUDIO	MUST BE IN A CUL DE SAC
FENCHED BACK YARD	HOT TUB AND POOL
2 BD UP/2BD DOWNSTAIRS	HOUSE W/COACH HOUSE-RENTAL
WALKING DISTANCE OF SCHOOLS	NEW BUILD (WITHIN 5 YRS)
FIXER UPPER	INVESTMENT PROPERTY
OPEN FLOOR PLAN-ENTERTAIN	MOVIE ROOM
OFFICE ROOM-ON GROUND LEVEL	OCEAN VIEW
CLOSE TO TRANSPORTATION	GATED COMMUNITY
GRAND FOYER	2+ FIREPLACES
MUST HAVE HEATED DRIVEWAY	NICE BUT OLDER NEIGBORHOOD
HOUSE W/ADJOINING VACANT LOT	HORSE PROPERTY
A LOT OF DECKS W/VIEWS	PRIVATE ROAD TO HOME
ASSOCIATION W/POOL AND TENNIS COURTS	SOLAR HEATED HOME
ENGLISH LOOKING TUDOR	STATELY GROUNDS

TRAINING
#4

TRAINING
PROBING™

REVIEW

Best place to probe:

1. Your office
2. Their home
3. Coffee shop

Where not to probe:
1. Over telephone
2. In car
3. As you're walking through a house

3 THINGS TO REMEMBER

1. Ask permission to begin 5 min
2. Crystallize on benefit - not feature
3. You can't blow it

NAME THE 14 BENEFITS

Write features on easel, then ask *"Which means that..."*

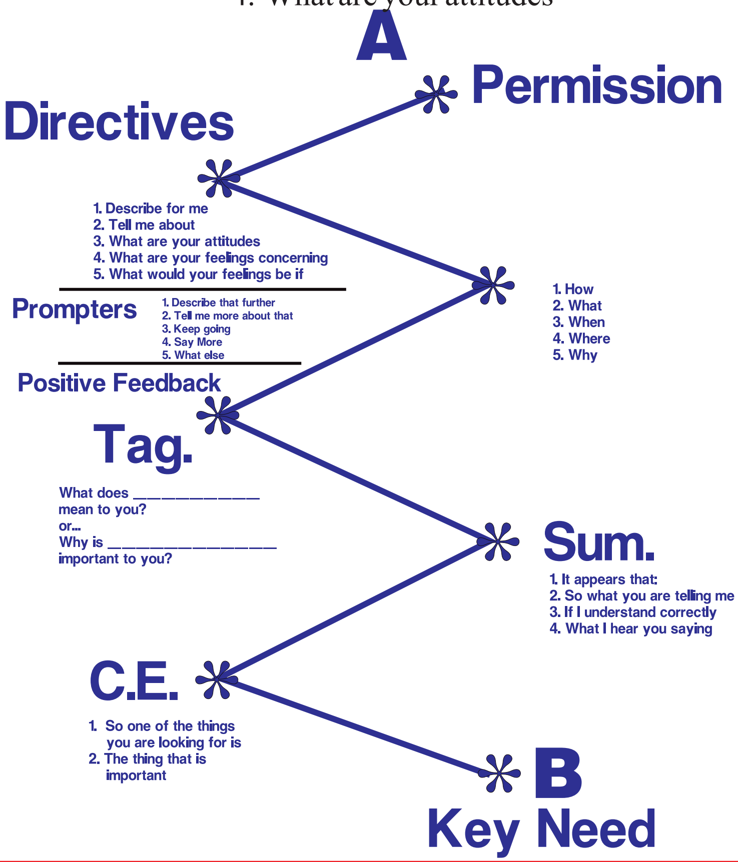
To convert feature to benefit

FEATURE	BENEFIT
Large yard	Prestige, value
Pool	Health, recreation
Library	Education
Back from curb	Privacy
Fire place	Comfort, economy
Sprinkler system	Convenience
Spa	Sex
Ten car garage	Love/Self actualiza tion
Burglar alarm	Safety, security
Old Victorian	Aesthetics

MODEL OF PROBING™

Use of Directives

1. Describe for me
2. Tell me
3. What are your feelings
4. What are your attitudes



ROLE PLAY

Ideas - choose one for group

- Break into partners & role play
- Ask an agent who is very effective to model the 6 stages
- Manager probes a participant in group
- Tape record a real situation with a client & play it back
- Video a role play situation and play back at cluster meeting

BUYER CERTIFICATION™

Fill out Committed Buyer Checklist™

- Check first section and certify
- Use close setup
- Set next appointment (Remember: If no appointment, no client. No offer in 2 weeks, no client)
- Come back to office. Meet w/ manager & clients or find property & write offer on property you are going to find.

Remember: If terms are not clear enough to write real offer without address & amount then they have not been probed.

SHOWING BUYER PROPERTY APPOINTMENT

Fill out offer and deposit receipt in blank and on clipboard. Give to client to hold while showing property.

- Meet with manager to pre-write offer on property yet to be found.
- Give clipboard with incomplete offer to buyer to hold while agent does other things, i.e. drive auto, show property, Quantum Home Tour™ with keys. (Remember this communicates to client that we are looking for an offer to present...not looking at property.)

AFTER SETTING THE APPOINT-MENT

"I will line up properties for you to write offers on. Before we see the property, I need for us to have an understanding. What is important to me is that you make a decision on each property we see. It doesn't matter what your decision is, it's just important to me that you make a decision so I can tell where I am with you and that I am hearing what it is you're saying with respect to finding your property. A 'no' is just as important as a 'yes'."

"I don't want you to feel pressured or pushed into something, I just want you to make a decision."

"So ___________(DAY)___________ when we are seeing your property, be sure to have your checkbook with you so you can write the offer on the property you choose. Again, if you don't want the home, don't write the offer. If you do want the home, be prepared to write the check right then and there."

"I will go ahead and prepare much of the paperwork on the offer and have it ready before we leave my office on ______________________(DAY)___."

TRAINER NOTES

Being “agent-centric” can cost you tens of thousands of dollars in lost listing business. To avoid this costly trap, evaluate your listing strategy based upon the “client-centric” guidelines below.

1. Begin by determining the percentage of time you spend “talking” on your listing presentations vs. the percentage you spend listening. The “agent-centric” trap is to spend most of the time talking. A more “client-centric” approach is to remember the old cliché, you have two ears and one mouth. Ideally, spend twice as much time listening as opposed to talking. Even more important—take notes. Writing down what you’re told sends a clear-cut message to the seller, that you really care about what’s important to them.

2. What is your strategy for connecting with the seller? Is your strategy to tell them that your company is “number one” and you’re the best agent to sell their home? If so, this “tell ‘em and sell ‘em” approach can seriously hinder your listing success. A more “client-centric” approach is to avoid “telling” and focus on asking questions. For example, “What features have you really enjoyed about living in your home?” “What has been your past experience in listing or selling a home?” “What are some of the features you would like the buyers to know about that might not be apparent as they walk through the property?”

3. Most companies provide a “Seller’s Guarantee of Services.” Instead of using the “agent-centric” approach of “tell ‘em and sell ‘em,” ask the sellers what concerns they have about listing their property. After listening and taking notes on their concerns, point out the items in your Seller’s Guarantee that address the issues they have raised. Also, let them know (provided it’s your company’s policy) if your company releases sellers from their listings when the Guarantee has not been met.

4. The “agent-centric” approach says, “I’m the expert when it comes to marketing your property.” Instead of being an “expert,” bring a sample 90-day marketing plan to your listing presentation and then, along with the sellers, customize it to fit their specific needs.

5. The “agent-centric” approach assumes that if the sellers list with you, they will also purchase their next home from you or give you their relocation business. This “trap” can cost your business a substantial amount of revenue. To avoid it, offer the sellers service as a buyer even before they sign a listing agreement. For example, if the sellers are staying in your market area, ask them about what features they would like to have in the next home. Offer to bring them a list of properties that meet their criteria as well as putting them in touch with a lender who can pre-qualify them for their next purchase. If they’re moving outside your market area, offer to put them in

TRAINER NOTES

touch with your company's relocation service. Thus, even if you don't get the listing, you can still make money from providing an out-going referral.

6. Perhaps the most costly of all "agent-centric" approaches is telling the sellers where they should price their property. As a real estate professional, you probably have an excellent idea about where the property will sell. Nevertheless, when someone else tells us "what to do," most of us resent it, especially if the price we have in mind is substantially different from where the market is. The "client-centric" approach, in contrast, shifts the agent's role from being the decision-maker about the price to providing the seller's with the best data possible in terms of their pricing decision. Once you have reviewed the market statistics, the dialogue is simple:

Mr. and Mrs. Seller, you can position your property where it will be in the 8-12 percent of homes that will sell next month, or you can position your property where it will still be listed for sale 30-90 days from now. The choice is yours, where would you like to position your property?

It's a New Year. Is it the right time for you to switch from "agent-centric" to "client-centric?"

TRAINING
#5

JELLY BEAN JAR TRAINING

DEFINITIONS

Green = Someone they think they will get business from or do business with.

Red = Anyone they don't wan to call again or who doesn't return calls 3 months in a row.

PREPARE LISTS

1. Have participants bring their JBJ™ count to training.
2. Identify where individuals/leads came from.
3. Create a plan of action to get more leads.
4. Verify that they have permission to call
5. Look at the schedule to call leads, schedule and make commitments.

READ HANDOUT ON "SIX DEGREES OF SEPARATION"

1. Have participants read handout.
2. Discuss with participants what it means to them.
3. Look at potential of each person in JBJ™ knowing two other people who they could refer = network of 600 actual if they stay in touch.

SCRIPTS

1. Make sure they have scripts.
2. Review how well they know scripts
3. Roll play and practice scripts

http://www.newscientist.com/news/news.jsp?id=ns99991829

Email to test "six degrees of separation"

19:00 23 January 02
Robert Matthews

An unexpected e-mail from a US university over the coming months may not be spam - it could be from scientists investigating a fascinating social phenomenon.

According to urban folklore, everyone in the world knows everyone else via just a few intermediaries - an effect summed up by the phrase "six degrees of separation".

The number six emerged from an experiment performed in 1967 by the social psychologist Stanley Milgram, who sent packages to several hundred randomly selected people in America's Midwest, with the aim of getting them delivered to target people in Boston.

Each recipient was given some details about the target, such as their name and profession, and was asked to send the package to a personal acquaintance whom they believed was more likely to know the target personally. Milgram discovered that on average the packages reached their targets after passing through astonishingly short chains, typically comprising just six people.

Six Degrees of Separation

01-Feb-2002

The concept of "six degrees of separation," which is the idea that there are only 6 people between you and anyone you want to reach, came from an experiment performed in 1967 by social psychologist Stanley Milgram, who sent packages to several hundred randomly selected people in the Midwest, with the aim of getting them delivered to target people in Boston.

Each recipient was given some details about the target recipient, such as their name and profession, and was asked to send the package to a personal acquaintance they believed was more likely to know the target personally. Milgram discovered that on average the packages reached their targets after passing through only about six people. In 1998, mathematicians Duncan Watts and Steven Strogatz at Cornell University showed that Milgram's finding can be explained by the "small world effect," in which just a few people with many different friends can quickly network through otherwise huge networks of acquaintances.

Attempts to replicate Milgram's findings have had mixed results, and even the original experiment didn't prove that the "six degrees" effect holds true for areas outside the U.S.

Now Watts and a team of researchers at Columbia University are now using the internet for a global version of the experiment. They are sending out e-mails that ask people to use their network of acquaintances to get an e-mail message to targets spread across the world. According to Watts, e- mail is ideal for testing Milgram's claim, since there are over 100 million e-mail users worldwide.

Only e-mails between genuine acquaintances will be counted as completing a chain. People will not be allowed to take a short cut by just looking up the target's e-mail address.

Watts has set up a website giving details about how to take part, and how to volunteer to act as a target. "Ideally, we'd like to have, say, 100,000 people, each trying to reach around 20 targets," he says. The team wants as many people take part as possible, because they suspect people's dislike of spam might otherwise ruin their experiment. Early tests show that only one in four e-mails are being passed on, so many thousands of people will have to take part for even one chain of acquaintances to reach the target.

So scan your spam carefully, before you push the "delete" button. "Perhaps people can't be bothered to pass them on — or perhaps Milgram was just wrong," says Watts. "Either way, we need lots of people to take part so we can tell."

Small world

In 1998, mathematicians Duncan Watts and Steven Strogatz at Cornell University showed that Milgram's finding can be explained by the "small world effect", in which just a handful of people with very diverse friends can "short circuit" otherwise huge networks of acquaintances.

But attempts to replicate Milgram's findings have had mixed results - and in any case, the original experiment fell far short of proving that the "six degrees" effect holds true for the whole world. So a team at Columbia University is now using the internet to attempt a global version.

Instead of a postal package, they are inviting people to use their network of acquaintances to get an e-mail message to targets spread across the world. According to Watts, who devised the experiment, e-mail is ideal for testing Milgram's claim as there are well over 100 million e-mail users worldwide.

Only e-mails between genuine acquaintances will be deemed to complete a chain. People will not be allowed to short-circuit the sequence by just looking up the target's e-mail address.

Chain mail

Watts has set up a website giving details about how to take part, and how to volunteer to act as a target. “Ideally, we’d like to have, say, 100,000 people, each trying to reach around 20 targets,” he says.

The team is keen to have as many people take part as possible, not least because they suspect people’s mistrust of unsolicited e-mail might otherwise scupper their experiment.

Early tests show that barely one in four e-mails are being passed on. With such a high rate of attrition, many thousands of people would have to take part to give much chance of even one chain of acquaintances reaching the target if Milgram’s six degrees apply worldwide.

“Perhaps people can’t be bothered to pass them on - or perhaps Milgram was just wrong,” says Watts. “Either way, we need lots of people to take part so we can tell.”

Why Math is Amazing

07-Sep-2005

Many of us non-mathematicians are intrigued by the movie "Proof," the TV show "Numbers" and the book "Freakenomics," even though we don't fully understand how math problems are solved. Now University of Massachusetts researchers have invented a new algorithm which solves the problem that has puzzled mathematicians for years: how does "six degrees of separation" work? This is the theory, made into a play and then a movie of the same name, that says that there are only 6 people between yourself and anyone in the world you want to make contact with.

First of all, what is an algorithm? Wikipedia.com defines it as a set of well-defined instructions for accomplishing some task which will result in the solution to a problem. A simple example of an algorithm is a recipe for making a cake. If you measure all the ingredients correctly and mix them in the right order, then bake the result at a specific temperature for a specific amount of time, you will end up with a cake.

The idea of six degrees of separation started in the 1960s with two psychologists who devised a plan: People in Omaha, Nebraska were asked to deliver a letter to a target person in Boston via an unconventional route: the message had to be passed through a chain of acquaintances. The people starting the chain had only some basic information about the target individual—including name, age and occupation—and were asked to forward the letter to someone they knew on a first- name basis in an effort to deliver it through as few intermediaries as possible. None of the people who initially sent the letter knew the target individual. Of the letters that reached the target, the median number of people in the message-passing chain was six.

Computer scientists Özgür Simsek and David Jensen were inspired by this research. "What came out of that study was that we are all connected," says Simsek. But the findings also raised a number of questions about HOW we are connected. What are the properties of these networks and how do people efficiently navigate them?

Participants in the study who efficiently sent the message probably acted intuitively by combining two human traits that apply to computerized network-searching as well: People tend to associate with people who are like themselves. Bostonians often know other Bostonians, and the same holds true for qualities such as age or occupation. The second important characteristic of these networks is that some people are more gregarious and have many more acquaintances than others. These people act as hubs, bringing many different people together with one another.

The algorithm that gets a message to the target person most efficiently passes it first to one of these gregarious individuals with a wide circle of friends, since some of them are likely to be similar to the target. Simsek says, "In this case, one plus one is more than two."

Jelly Bean Jar Permission Script

My business is referral dependent. I am putting together a small group of people who I will stay in touch with on a regular basis concerning my real estate business.

I'd like to include you in this group and what that would mean is that I'd be touching base with you once a month for a two minute phone call to ask if you know of anybody I should contact who has any needs regarding real estate. Would that be okay? I really appreciate that!

Also, in the event that you have any needs or anything that I can get from this group on your behalf, I'd be happy to pursue that as well.

Jelly Bean Jar Protocol

1. Fixed in size
2. Personal contact every 30 days
3. Look for red ones
4. Add one - you must drop one

First Jelly Bean Jar Call - People You Know

Introduction

High toned, Enthusiastic to talk to them, Get permission to talk first!

Go slow, make sure they understand what it is you are saying, pronounce every word carefully.

Hi (_________name), this is (__________________your name, with ____Company Name_______, how are you?

Do you have a couple of minutes right now to talk?

Great, thanks....(___________name), as you probably know already, my business is *"REFERRAL DEPENDANT"*. I have been looking at my business plan for the year 2000 and where I want to go with it, and I have decided to put together a small group of people. People that I have relationships with like you that I would stay in touch with on a regular basis as part of building my future business. And my purpose in calling is touch base with you and see if it would be all right to add you to this group. (Pause......) What this would look like is that I would call you once a month just to say "Hi" and see if you knew of anybody I should be in touch with that has any needs in real estate...it would only be a couple of minutes each month as a phone call...? (Wait for response)

In The Group

Let them know you really appreciate them and their willingness to participate. Now give back something if you can!

(_________name), GREAT, I really appreciate this...I promise I won't bother you with this and if you need anything from me, that would help you when I am contacting this group, I would love to do that. I want this to be reciprocal. For example, I have someone that can ________________ or I have included someone that will____________________.

Mailing

Let them know you will be mailing and offer again to help them.

Also, I will be sending something out in the mail each month, keep and eye out for it, I would like your feedback very much. And please let me help you with anything you need that could come from the benefit of this group.

Subsequent Jelly Bean Jar Calls

Introduction

High toned, Enthusiastic to talk to them, Get permission to talk first!

Hi (_________name), this is (__________________your name, with Prudential Preferred Properties, how are you?

Do you have a couple of minutes right now to talk?

Great, thanks....(___________name), This is my monthly follow-up call, just to touch base and see how things are going. (Wait....let them talk)

Relationship

Go slow, make sure they understand what it is you are saying, pronounce every word carefully.

How are things with you?

Is there anything I can help you with or anyone in my group that you need anything from?

Is there anyone you know of that has any real estate needs that I should be in touch with?

Let them know you really appreciate them and their willingness to participate. Now give back something if you can!

(_________name), GREAT, I really appreciate this...I'll touch base with you next month, please keep me in mind, my phone number is on that (____________) I mailed to you, if something comes up give me a call...OK?

Thanks again (____________name), Talk to you next month......

TRAINING #6

8 POINTS OF LEVERAGE TRAINING

INTRODUCTION

1. The participants in this training are agents who not yet productive.

2. The purpose of this training is to train them in thinking about the key points of managing and influencing their business and to get them to take responsibility for their progress.

DISCUSSION

1. Have participants write down what they think the key points of managing their business are. (Tell them that they will not be asked to share this unless they choose.

2. Have the group share them and write them on the flip chart.

3. Build a consensus on the most important.

DISTRIBUTE THE HANDOUT

1. Have participants read handout.

2. Discuss with participants what it means to them.

3. Have participants rate on a scale of 1-10, 10 being best, how well they are managing their business with each item.

4. Group discussion on what they observe and how they could change what they are doing.

PLAN OF ACTION

1. Have participants create plan's of action based on this work.

1. Time Management (P. I. N. and TIP analysis).

2. Making Appointments (When,What Time Which Time,How soon).

3. Shaping Your Language

4. Recognizing Buyers (Buyers who Buy...Buy).

5. Establishing Committed Business Relationships

6. Working Coherently (Scientific Marketing)

7. Establishing a Buyer's/Seller's Needs through Prob-ing™

8. Closing as a Process - Not an Event (My assumptions are:).

TRAINING #7

Probing™ Strategy Workshop

Overview:
Often when agents are not making Probing™ appointments, it is because they are not clear why they should be making them with people who are not about to buy or sell property. As a result, they are not effective in communicating why the appointment would be beneficial to the contact.

This is a BIG mistake. There is always a reason to have a Probing™ appointment with your jelly bean jar contacts.

Begin: Ask these questions

"How many of you have contacted every one of your jelly beans in the past 30 days…EVERY one?"

"How many of you have made two Probing™ appointments per week on a regular basis?"

"How many of you have three certified buyers?"

"How many of you routinely ask for an appointment for a Probing™ ?"

Once you see that most of them are in the same boat…ask

What stops you from asking for an appointment?" Write the answers on chart.

A to B review: Diagram is on the last page
Go through the A – B from the S.E.L.L. training. Draw it on the chart.
Be careful not to lecture. It is interactive. Wait for the answers before writing.

- A is ______? (What you have) and B is ______? (What you want)
- As you go from A to B, you encounter an ______? (obstacle) along the way.
- You make a ______?(decision) to ______?(pay the price).
- If you choose to pay the price…you continue on the path to B- what you want.
- If not, then you immediately create ______? (reasons why not)
- Reasons are reasonable, logical, sensible and rational. Thus they are called reasons.
- All choices to do other than what it is you want is always based on ______? (fear)
- So instead of getting to B (what you want) you end up at C. ______? (somewhere else)
- The reasons based on fear and so are a lie. So you have given up the power over your outcomes to the lie, to fear. In order to recapture your power, you need to confront the lie and find the real truth. Power comes from ______? (telling the truth)

Without confronting the lie, you keep ending at the same place, somewhere else.
If you continue in this conduct, you will eventually fail. In the dictionary sense…You will fail out of RE to something else.

Look at the "reasons" on the chart. Pick the most Either/Or kind of reason. [such as my baby sitter quit, my kids were sick, my husband was angry about missing a Sunday…etc.]

This is called "what you resist, you are stuck with"

Let's look at the reasons a contact should have a Probing™ meeting with you.

There are four types of contacts (Jelly Beans)

1. Never going to buy, sell or refer.
2. Not going to buy/sell for a year
3. Going to buy in 7-9 months
4. Going to buy/sell soon (90 days)

Never going to buy, sell or refer

If they are never going to refer, buy or sell, then the Probing™ appointment will be valuable for you, so you will know now rather than later. You might be able to create a referral source. Your strategy for this person is to make friends and ask for referrals.
What's in it for them? They may be interested in real estate market (90% of the population is)
Your goal is to either stay in touch and ask for referrals or delete them from the JBJ™ .

Going to buy/sell in a year (Long Term)

Then they need to get clear on what the future is for them. Your job together is to start creating a strategy for what they need to be working on in the next months.

- Financial issues. Many people have to clean up their credit.
- They can get in touch with the issues that are important to them. (Crystallization)
- If they need to sell, they will want to look at issues with the house. Such as inspections, improvements and maintenance.
- You need to become a part of the strategy. Make sure at the meeting you design a job for yourself. This is where you share your rolodex. Introduce them to your lender.
- Run a Prelim for them to see if there are title issues.
- Remind them that this is not the time to buy a new Ferrari.

- Your goal is to get permission to call them monthly to update the situation.
- Contact them every month. See what they need.

Going to buy/sell in 7-9 months (Mid-Term)

Now they're in need of specific information and strategies. This is the very active part of the "Information Gathering" stage. A Probing™ session helps you and them understand how important information is to them. It is important for them to define what information is most important to them. Your job is to help them determine what it is and to provide it.

- Financial issues are becoming imperative now. Introduce them to your lender, making sure they get qualified. Work on any credit issues.
- Property values are now very important. They need to get CMA and properties that meet their financial and emotional needs. You can provide this kind of information through your MLS on an automated basis.
- They may need a referral to another city
- Things change constantly and they need to stay on top of their property value and the value of properties they could buy.
- Some of the issues from the Long and Short-Term apply here.
- Your goal is to create a relationship where you are the go-to person.
- Contact them 2-3 weeks. Put them on the auto-notify system.
- Ask for feedback on the properties they've been sent.

Going to buy/sell in near future: 90 days. Active Stage.

Now they are in the Active stage. Their case is urgent. If they are to act soon, they have clear and present needs. A Probing™ session here is obvious. This is the standard real estate client. Everyone knows pretty much what to do here.

- Get them to your lender immediately. They need to start the qualifying process right now. The lender needs to qualify them, check their employment, verify the down payment, etc.
- If they need to sell, they need to get it listed and a QHT™ scheduled.
- They may need to do so clean-up, de-clutter and maintenance.
- They need to know what their personal issues are (crystallization)
- It is time to look at actual homes they want to buy. Or a referral to an agent in the area they want.
- Start showing appropriate properties. You take them.
- Contact them several times per week.

[In all of these lists, know what needs to be on the list, but ask the agents to make up the list. They need to work for the information. This is not a lecture; it needs to be very interactive. They already know all this. Let them re-discover it for themselves. You may get some great stuff from them.]

So, when is it not in the contacts best interest to meet with you for a needs and strategy meeting? How about NEVER!

Get together into threes (twos if it's a small group) to discuss what you might say in each instance. Create some dialog to answer the question, "Why should we meet?"
Have them write down the dialogs ideas. Collect them and have them typed up and distributed.

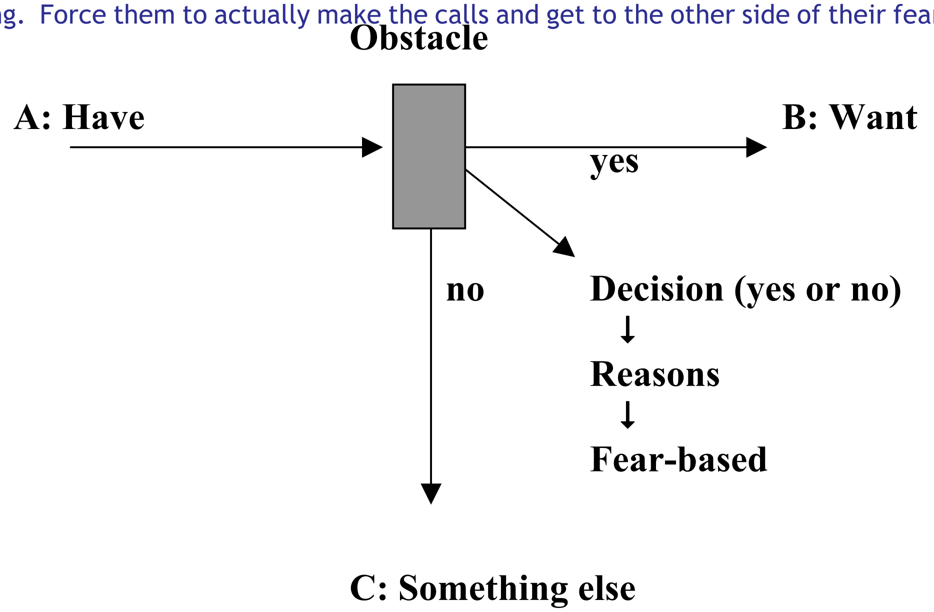
Live calling session (aka Jelly Bean workshop or Dialing for Dollars)

Create a calling session where they make calls with your supervision. Recognize that it is going to be a bitch. They will make all kinds of excuses for why not. If it's a big group you will need help.

Most likely, this will not be in the same triage session as the previous work. Get a commitment from them for bringing with them their contact list, including the phone numbers, to the next triage. Have the calling session then.
They will not have "prior commitments," it is the regular triage time with the regular breaks.

This gives them at least two hours and more than a few chances to get through the process. The first few will be a struggle. If they don't stay with it long enough, they won't really get to the other side.

You need to closely supervise the calls. Listen to them; give them feedback, keep them going. Force them to actually make the calls and get to the other side of their fear.



Fear-based, path to real failure.
Soon, "something else" is out of RE

TRAINING #8

TRAINER NOTES

Purpose:

When given the chance to create a new jelly bean, agents often forget to get into relationship first. They either sit back and wait or they go for the jugular.

At the QHT™ they begin to ask about the housing needs too soon. They start talking about how cool the house is. On a floor call, they read the MLS information rather than find about the person.

Count everyone off: 1 or 2.

The ones form a circle, facing out.
The circle needs to be wide, not tight.

The twos find a partner, forming a circle on the outside, facing in.

The inside is the Realtor. The outside is the visitor.

You are at an open house and have done all the stuff, so now you are just talking.

GO. [Give them 5 minutes.]

Ask each partnership what the housing/real estate needs of the visitor are.

Most of them will have an answer. Get answers from each twosome before commenting.

If there is anyone who says I don't know yet…That is the right answer. Say so.

If there is nobody who says I don't know yet, ask each of them what they know of a personal nature about the visitor. If they say they have children, ask how many? What ages? What activities do they engage in? How long have they been married? They won't be able to answer, because they didn't get personal.

You will have to make up the follow-up questions until they can't answer.

Then ask, "What's the point?"

[Spend the first five minutes getting personal. You need to get into some kind of relationship first]

Now the outside is the Realtor and the inside is the visitor.

[Give them five minutes again.]

Ask them again what they know of a personal nature. [Ask a few. Asking all of them my take too much time]

Switching.

The inside ring stays put and the outside ring moves one person to their left.

Do the exercise again. 5 minutes each.

Next five minutes:

After they finish with the second round, have them rotate again with new partners.

This time they will do the first five minutes, you call time and during the next five minutes, they need to ask questions that uncover a hot button. Something they can create a drop-by appointment with.

[Extra credit: Look in the manager's manual for a list of "hot buttons" Make a copy of it and cut them out. Give one to each of the players. The Realtor can then try to uncover the hot button.]

Let both partners participate.

You should now be out of time for the workshop.

TRAINING
#9

TRAINER NOTES

This could easily be two workshops or one long one.

Purpose:

Often we lose track of the meaning and value of the Jelly Bean Jar. We, as managers and trainers, begin to look at the immediate picture: Where is the very next deal coming from?

Our charges, the JTM members are naturally looking there. They want to get paid before they go broke. The want to graduate and get out of the program and on with their lives. Problem is, that is "Real Estate as Usual- 101"

Of course we want to get the deals done, and sooner than later. But if we lose sight of the long-term benefits of the JTM program, we let it devolve back in the swamp of REaU-101. The thing we can give the JTM members for life is the Jelly Bean Jar that provides business ad infinitum.

Step one:
See where they are in the development of Jelly Beans and the quality of them.

On the flip chart, draw 5 lines/6 columns vertically like this:

JTM Name	Total # JB's	From QHT's	Prospect	45 Days Buy/List	JTM Time/Mo
MB	160	40	10	3	5
BG	47	6	1	0	1
BH	200	50	15	4	6
Etc.					

Ask each person to estimate the total number of Jelly Beans, How many of them *walked into a QHT™* (meaning not from permission gathering, SOI, the

TRAINER NOTES

PTA) They parked their car, walked to the door, signed in and had a tour, whether or not they gave you an appointment.

Talk about the fact that the QHT™ people (and Floor calls) have made a definite move to indicate they have something going on in their heads about real estate. The statistics tell us that ___?__ (82%) of them are going to buy or sell within ____?_______ (9 months.)

Choose the best, fullest, highest number of jelly beans to do this math:

Draw on the Flip Chart:

There are 200 total JBs

QHT (above the line)

40 JB
X 60% (Real buyers and sellers. We're being pessimistic)
X 50% (The ones that will work with you)

= __?__

12 Transaction (trick: 50% x 60% is 30%; so use 30% of JBs)

40 calls/month X 5 minutes/call X 12 months = ___?__ (2400 mi)

2400 minutes **40 hours** (divide by 60 min/hour)

For 12 deals ➡ 3:20 hours to get TO the deal, not to complete it.

(Another math trick: It is going to equal the # of QHT JB because 5x12=60 then you divide by 60.

Meaning that every JB is one HOUR per year!!)

Everything Else
160 JB
X 10% (Real; we're being optimistic!)
X 50% (your share)
=__?__
8 Transactions

160 calls/month X 5 min/call X 12 month = __?__ (9600 minutes)
9600 minutes = **160 Hours**
For 8 deals ➡ 20 hours to get **to** the deal.

TRAINER NOTES

So what is your job as you call your JB's?

(Find the red ones quickly and efficiently, stop trying to turn sand into gold.)

Remember, you do not have to lose the red one forever, you can just include them in your SOI or other contact list.

The flip chart is everyone on the planet (not to scale)

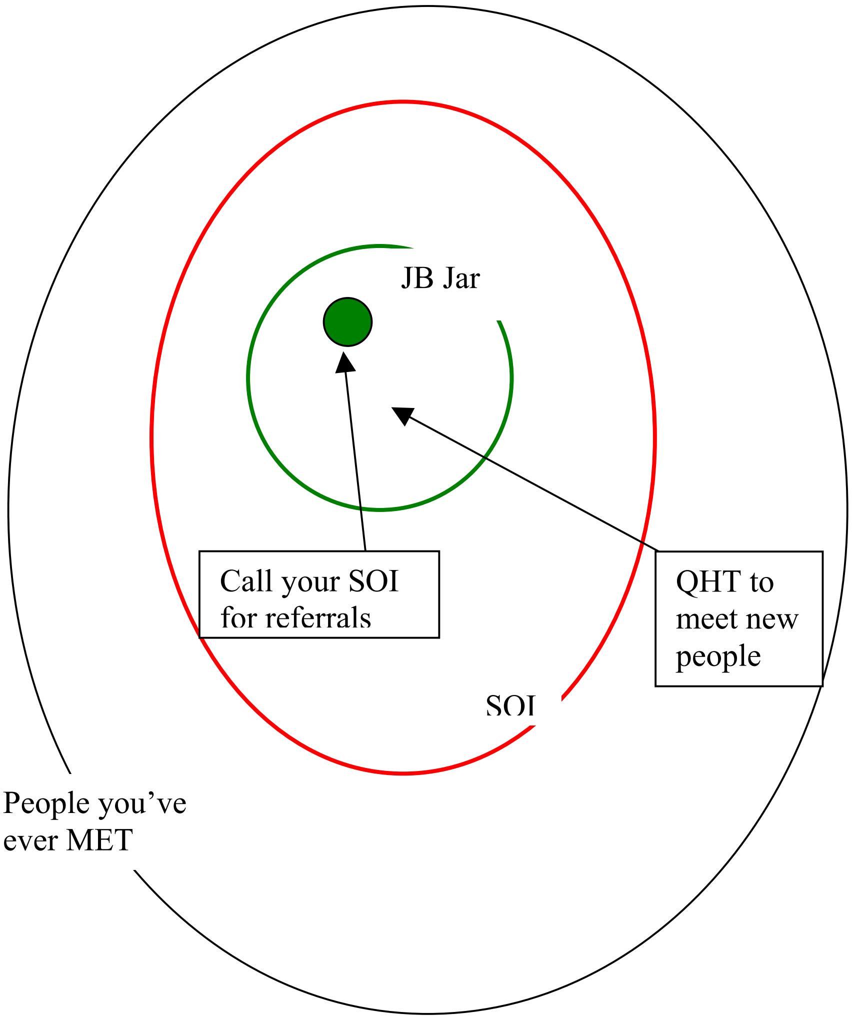
Outside circle are people you've met somewhere. May not know your name.

SOI (Red) is your sphere of Influence. These people know your name.

JB Jar are your best. These are the people you think are going to buy/sell w/in 9 months AND you have talked to them in the last 30 days. Green dot is your referral sources (Raving Fans)

You get JBs from your SOI and QHT.

You MAIL only to your SOI. It will grow over time as you drop out jelly beans from the Jar into SOI. You mail to this group to keep reminding them how you work hard. This insures you will get the “accidental” business from your family, friends and SOI.



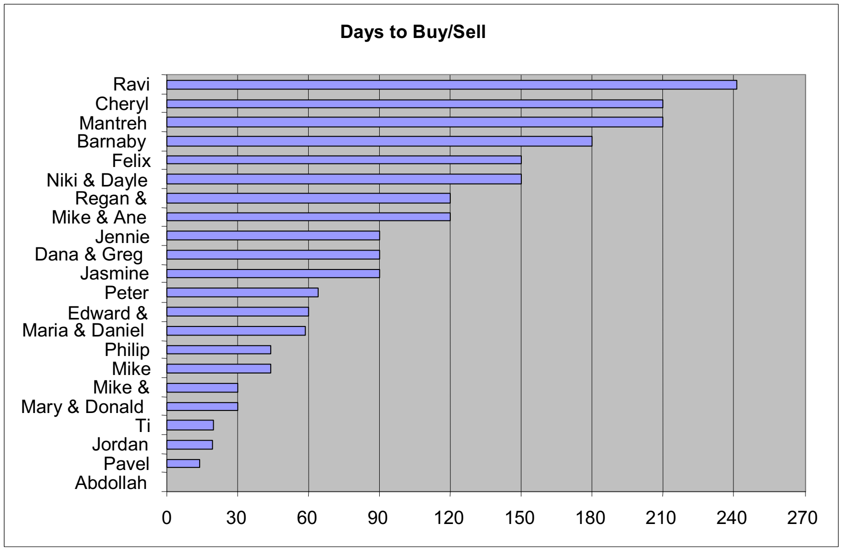
That's looking “down” at the Jelly Bean Jar. Let's look at it over a timeline.

This is just a part of a Jelly Bean Jar analysis we did in San Jose:
We asked Brian Sheumaker to guesstimate when he thought his JBs were going to mature and do something. He put that into his Jelly Bean Jar database and exported it to Excel spreadsheet. Then we calculated the days to maturity and graphed it.

What you see here is a snapshot of what his business timeline looks like for nearly the next year. Who to expect in 30 days, 60 days, 90 days, etc.

Another Look at Your Jelly Beans – JTM Workshop

Now some if not all of the JBs may move forward, but he can see what his future looks like. He can "see around corners"



Here is another way to look at the results from the Jelly Bean Jar activity:

# Calls (JB)	% Real (Green)	% Yours	# Deals
200→	20%	20%	8
200→	50%	20%	20
200→	50%	50%	50
200→	60%	60%	72

What this means is that you start out with the same basic results as if you did not do the Jelly Bean Jar.

1. As you continue to call them, %Yours increases.
2. As you drop red and add green, the %Real increases.

The number of actual calls remains the same. Because both results increase at the same time, the increase in results is dramatic.

TRAINING
#10

MarySusieJoeFredetc 10/2 No0/0 no20/2 yes5/0 noetc

TRAINER NOTES

Purpose:

People are not making calls to their Jelly Bean Jar, not making Probing™ /Strategy appointments, are not holding QHT, or resisting other prospecting activities.We need to re-focus them on those activities that drive their business.

Materials: Two flipcharts

Begin: Start with the right hand Flipchart:Write every person's name/ how many people they talked with/ How many appointments

Then ask is that what you set out to do?Is that enough appointments to drive the career or business you want? Write yes/ no

Notice how many NO's there are.

Mary Susie Joe Fredetc etc.	10/2 No 0/0 No 22 Yes 5/0 No etc.

Flip to next page on the chart.Collect the reasons why not, what stopped you, etc. From everyone.

Ran out of timeI was sick Son's birthday Felt depressed Kid's fault Had to show property Etc.

Now go over to the other chart.Draw a line across the middle.

In the upper box, ask the group to define what $450-500K (or whatever success looks like in your area.)

On the bottom, what does failure look like (two transactions per year)

TRAINER NOTES

$450 per year $4 Million in nest egg Paid off house Kids at expensive college Vacations anywhere in the world The esteem of my colleagues Two Mercedes Etc
$10K per year (or two Transactions) Lose the house Kids in City College Debt/Bankruptcy Etc/ Pushing a Shopping cart.

Go back to the first chart, flip to new page.
Draw the A ——— B
Have the group fill in the answers:
A is ___________ [What you have]
B is ___________ [What you want]
Along the way you come up against an obstacle.
You are required to make a ______[decision]
To ___________ pay or not pay the price.
When you decide not to pay the price, you immediately create ___________ [reasons]
These reasons are always based on ______ [fear]

The reasons are always a ______[lie]
Power comes from _____________ [telling the truth]

In order to get to B, you have to get back to A.
You cannot get to B from C.
You cannot get there if you hold onto the reasons as reality.

You can only get to A to get a new start when you figure out that the reasons are not the truth.

So looking at the chart you just built, which is A and which is B?

That means that when you are making a choice to call or not to call, for instance, you are not choosing to call or not make the calls. You are choosing between having your kids in great colleges or pushing the shopping cart.

So what's it going to be?Nest egg . . . Bankruptcy?
[use the stuff they picked]

TRAINER NOTES

Now form into diads

Pick first and second person.

First person: You Probe: 10 minutesTalk about what success looks like for you. Real success.Describe your life at that levelTell me the good newsTalk about what would be different from nowWhen have you experienced being highly successful in the past.Describe that..

And so on…

Change partners: 10 minutes.

First Person: You Probe: 10 minutesDescribe failure for you.Talk about the changes you would need to make if you only made $10 per year.When have you had an experience of failure?Tell me about that.

Change partners.

TRAINING #11

TRAINER NOTES

Purpose:

Often agents struggle with the process of Probing™ with Sellers and potential sellers. They struggle with what questions to ask, what are the issues facing sellers. In the Probing™ Training we focus on working with buyers of real estate, partly because that is where most new Realtors begin. Eventually they come across a listing opportunity and need to know what to do.

Now is a great time to review what your job and purpose is:

My purpose is to work with you and get enough information on the table so that you can make the very best decision in your own personal best interest, without regard for whether you list and sell with me.

Set the Room:

Put group into sets of three. One is the Prober. Raise your hand if you are the Prober. The Seller is to your left and the Coach is to your right.

When we rotate positions, stay in your seat, rotate the jobs clockwise.

Since we are already adept at the greeting, making them comfortable, getting them coffee and the relationship stuff, start the role play as if that is already done. You don't need to practice that part.

Review material for the role play:

First we must review what the Probing™ process is about. What it primary and ancillary benefits are.

The purpose of Probing™ is to ___________

(have the customer crystallize.) They will have forgotten this in general.

Make sure everyone remember this point. It is CENTRAL to the process of Probing™ .

TRAINER NOTES

Who needs to be in charge of the process? ____________

(They must be in charge of it. We can only facilitate it. It is our intent for them to uncover whatever issues are there for them.)

What do they get out of it? ____________

§ They uncover their often unconscious emotional, human needs.

§ They find out what is important to them and what is lesser and why.

§ They discover and consider options.

§ They work out differences between spouses ahead of time.

§ They look at problems/issues that need resolving ahead of time so they can be solved.

What do we get out of it?

____

§ We learn what their issues are.

§ We create credibility for ourselves and set ourselves apart from the competition by dealing with their real issues, rather than our brag book or promising more advertising.

§ They look to us for leadership and we gain permission to provide leadership.

§ We get permission to tell them the truth what ever that is without fear of "losing" the listing.

§ We determine whether or not it will be in OUR best interest to take their listing.

§ We make what we charge seem worthwhile.

Review the Format/Structure of a Probe:

Use the handouts from the Probing™ Training.

1. Relationships stuff

2. Permission

TRAINER NOTES

3. Fill the Grid
(15 MINIMUM -30 Minutes)

4. Identify the 2-3 most important issues

5. Drill down to the underlying meaning for those issues.
(About 5 minutes apiece)

6. Ask for the meaning of the Feature (Tag)

7. Confirm that the Issue is based on the Meaning (Summary)

8. Then confirm that when you take on the project the Meaning needs to be handled. (Closed end)

Notice that the format and structure is exactly the same as when you are working with a Buyer, only minor changes in language and a different focus is required.

So what are the issues a Seller most often needs to resolve?

Let them develop the list for you. Write their answers on the board. This helps them understand that they really do already know and gives them confidence.

Some Issues:

§ Time line

§ Price vs. time

§ Downside of not selling quickly?

§ What is causing the decision to move?

§ How is the family affected by the changes?

§ What is the good news about it?

§ What is the bad news?

§ What is their experience with working with a Realtor?

§ Have they considered FSBO?

§ What are the issues with leaving this house?

§ What are the best features of the house?

§ What are the drawbacks to the house?

TRAINER NOTES

§ How is your work involved in the decision?

What are some ways to ask Directives to uncover this information:

Selling your home is much more than a financial decision. It affects every aspect of your life and your family's life...

Selling your home is a royal pain in the rear…so…

§ Tell me about your situation.

§ Talk about your time in this house.

§ Describe your life in this house.

§ Talk about the involvement of your work and this move.

§ Talk to me about your family vis a vis this move.

§ Describe the best features, your favorite features of this home.

§ Talk about what you would consider changing to make it better.

§ Talk about what you would want the buyer to know.

§ Help me understand your thoughts and reasons for changing.

§ Talk about what makes it difficult to leave this home.

§ Tell me about your experience with buying and selling.

§ Talk about your experience with Realtors. Both the good and the bad news.

§ Describe a perfect transaction.

§ Tell me what you think a perfect Realtor would be like. If one really existed…hee, hee. (You *need* to chuckle here!)

§ Think about your feelings if you turned down a great offer and only realized it after it was too late to get it back.

TRAINER NOTES

§ Tell me about your community involvement and how this move will affect that.

§ Tell me in a summary way about what you would like in your next house. (Where, upsize downsize, etc. Not detailed buyer interview.)

These are just a handful, collect theirs as well.

You will be surprised at the insight they already have.

Drilling Down to the Meaning of the Issue:

The process here is to get them to describe the issue enough so that the meaning becomes clear for them. (aka Crystallization)

First find the 2-3 most important issues we have covered. The order them 1-2-3.

Begin, as always with a Directive:

Talk to me about _________1st Feature/Issue_________.

Lots of positive feedback and re-giving them permission to keep going.

When they run down…

§ What does it look like

§ How does it influence…

§ When have you had that experience in the past?
How did you feel then?
How did that resolve?
What did your learn from it?

§ What (Who) else is involved?

§ What would be the best outcome?

§ What would your feelings be if ___alternative choices___?

Here the agent must just follow their lead. Go where

TRAINER NOTES

the answers lead you and allow whatever the answer is to be the answer.

Don't push them to an answer that works for you.

After reviewing the language and the process, it is time to role play. Now, just before they begin the role play make sure they know who is who in their triad.

Lay the foundation for your presentation:

Adding this piece at the beginning of the presentation softens it a lot.

> There are several outcomes that we may arrive at…
>
> You may decide not to sell your home at all.
>
> You may decide to list it but not with me.
>
> I may decide that I cannot best serve your interests.
>
> You may decide to list and sell with me.
>
> And so on…
>
> Just know right here and now, that any of those choices on your part are fine with me.
>
> [restate your job] I am here to be sure you have all the information to make the decision that is in your own best interest, my best interest is not at issue.

Permission:

Do it your way in your language. But include:

1. What you are going to do
2. How long it will take.
3. Why it is important.

Role play.

A lot of the language will be on the flip chart so they can use it for crib notes.

Write up the answers they gave as well as what you provided and hand them out later.

TRAINING #12

TRAINER NOTES

Purpose:

The whole purpose of having and building a Jelly Bean Jar is to have future business waiting for you when the future shows up. The only way to have that be so is to keep in relationship with your JBs over time. There are a thousands reasons why not to do it. Remember: it is ALWAYS fear-based behavior. Our purpose with this workshop it to uncover the fear.

NOTE: It is a good workshop to do before a Jelly Bean Jar call-session. Make sure everyone brings their Jelly Bean Jar list and has made a commitment to calling for at least an hour afterwards.

Begin:

Write on the flipchart the reasons they have not made the calls they need this week. Each week, they need to call 25% of their Jelly Bean Jar. You might write down the Number of JBs in one column and the reasons why they didn't call in the other. You will use the reasons why not later.

Go to the other flipchart.

Point A to Point B

Draw the picture as you go.

Remember this is interactive. Don't write the words on the chart until they give it to you.

A is what you __________ (have) and B is what you _______ (want)

On the way from A to B, you encounter an _______ (obstacle) along the way.

At the obstacle you are required to make a _______ (decision) Yes or No. You must decide to _______ (pay the price.) [A decision, not a choice. Decision is binary.]

If the answer is Yes…you continue along the way to B. If the answer is No, then you immediately create the _______ (reasons why not.) These reasons are

TRAINER NOTES

reasonable, sensible, rational and logical. Thus they are called reasons. They are why doing what is not in your best interests seems right.

They are always based on _______ (fear.) Any choice to do what is not in your own best interest is always based on fear.

So on your way to B (what you want) you end up at C _______ (something else.)

Until you uncover and confront the lie that is in the reasons, you will remain at C until it becomes “failure” in the dictionary sense. You will fail out of the business into something else.

If there is fear in the decision and the reasons are not the truth, then you have given away power over your outcome up to fear. You cannot change your out-come until you uncover and change the lie that is at the root of your reasons.

Power comes from _______ (telling the TRUTH)

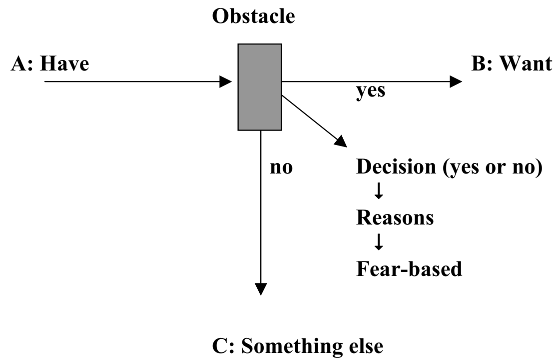
What you resist, you are stuck with. If you resist the truth and cling to the reasons, you are stuck with your “something else.”

Now go back to the other chart and choose just one very reasonable reason and debrief it.

If you can, choose one that looks like Either/Or thinking. “My kids were sick, the baby sitter quit.” That’s the Mommy syndrome. If you can get some-one to work through that, you can really make a difference.

Just do two or three.

If you have time (don’t let this go over an hour) Put hem in twos and let them debrief their reasons.



TRAINING #13

TRAINER NOTES

Purpose:

Once we get the process of filling the grid, the question becomes "How do I then get the client to the point of crystallization." We often get them to an emotional need, but it may not be the driving or most underlying need.

For instance, they're talking about the Kitchen-Great room. They're talking about having family and friends over, having fun together and entertaining. Entertaining is one of the needs, but in most cases the underlying or driving need is love and esteem, often in the context of nurturing and expressing love for family or belonging to their clan or tribe. There are often powerful feelings and emotional needs well beyond entertaining at work here. These are often unexpressed and unconscious.

Set the Room up:

Put the group into triads with a Prober, Probee and Coach. Rotate clockwise.

Have them already in the triads before you start with the material so they can begin the role play immediately.

We are only going to practice this narrow piece of the process, not the whole thing so each person can go through it several times.

The material (the Trick):

If a person can actually experience, or in many cases re-experience an event in the past, they can easily crystallize on its meaning and importance for the future. Remember the Skier's experience in the Probing™ training. We just took them back to the event and rewound the tape over and over again.

The language:

As always, begin with the Directive.

"Tell me about [the feature.]"

Encourage them to continue, giving them positive

TRAINER NOTES

feedback, prompters to give them permission to go on. When they wind down. Start in with Modifiers:

Who
What
Where
When
How
Why [carefully. Why can cause defensiveness!]
It is usually be to phrase it with a how or what.

Get them to BE in the place:

What color are the walls?
Where are the windows?
Describe the furniture.
What's on the walls, floor, etc.

Then begin to populate it.

Who is there?
What are they doing?
What are you doing?

Then get to the feelings

How do you feel, being there with them?
How would I feel, if I were there?

Now see if there is a childhood memory that is connected

[Remember the story by the UCLA psychiatrist.]
When in your past have did you see or experience that before?
What was that like?
What were your feelings then?

[TAG]

What would it mean to you to have that [feature?]
Please, here, don't stomp on their experience.
Don't reiterate every word they've said. Just keep it brief:…
"What would it mean to you to have that kind of Kitchen- Great Room?"
"How would your perfect Kitchen-Family Room be important to you?"

Start the role play:

Since we are only going to practice a narrow slice of the probe, ask the Probee what is the most important place in the house. Start from there.
Go around the triad twice at least.

TRAINING
#14

<u>Background:</u>
It is <u>a lot of hard work</u> acquiring your Jelly Beans! You spend hours:

- printing up and passing out invitations
- getting sign permissions
- putting up signs
- taking down signs
- building relationships, and
- making and keeping appointments.

When there are only a few Jelly Beans in your Jelly Bean Jar, managing them is simple. But, your Jelly Bean Jar can become very unmanageable, confusing, and frustrating, if you don't have a good system set up from the beginning.

<u>Juggling:</u>
We are, in effect, jugglers. Anyone can "juggle" one or two objects in their hands – you don't need any training, or foundation, for this task. But the lack of training (foundation) becomes apparent very quickly when just one or two more objects are added into the juggling act. However, someone who has trained and knows the proper techniques can add a number of objects and handle them effortlessly.

If we don't have an efficient method of handling our Jelly Bean Jars, you will lose some of your hard-earned Jelly Beans – simply because they "fall through the cracks".

<u>Who Can Benefit From This Training:</u>
Everyone. Even if you're using another database, or contact management system (ACT, Top Producer, Goldmine, etc), there's bound to be "foundational" items here that can be applied to other systems.

Let's Begin…

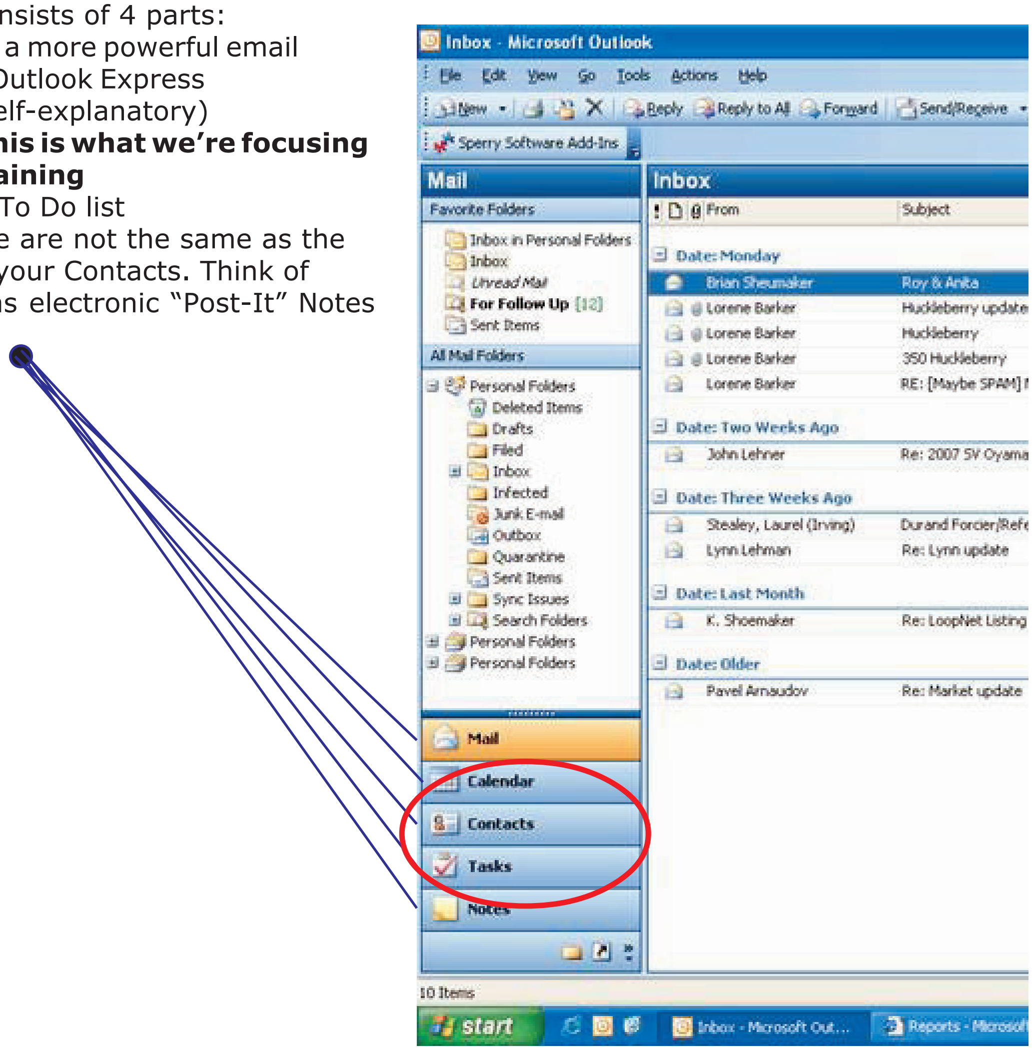
Key Things To Remember:

1. If you haven't selected a contact management system yet, and you have Outlook on your computer – use it.
    a. It's the most widely-used system, and you can transfer (export) your data to something else later if you need to.
    b. If you don't have Outlook, or any other system, Outlook is probably a good choice to invest in
2. You *will* need to *invest* some time entering your new contacts into your Jelly Bean Jar.
    a. Notice the word "invest" – you will be paid back in time saved by doing this early on.

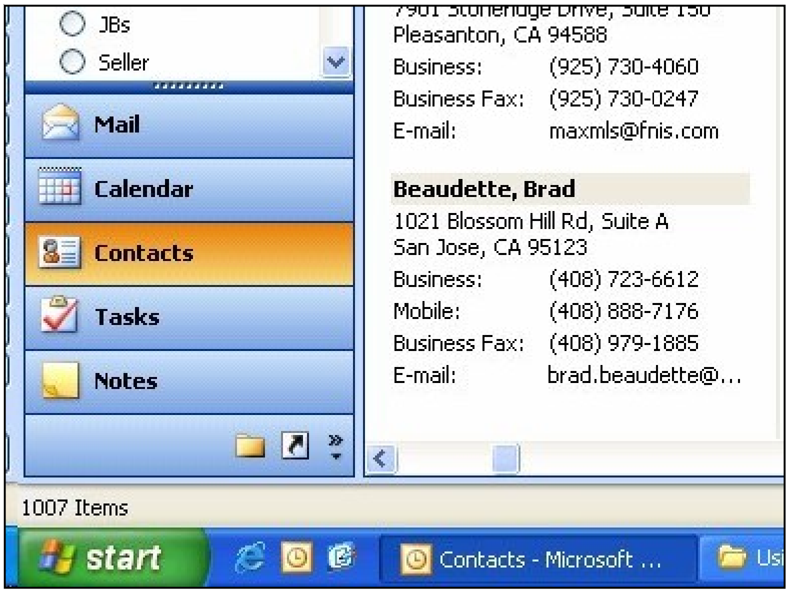
What is Outlook?

Microsoft Outlook consists of 4 parts:

1. Email – this is a more powerful email system than Outlook Express
2. Calendar – (self-explanatory)
3. **Contacts – this is what we're focusing on for this training**
4. Tasks – your To Do list
5. Notes – These are not the same as the Notes within your Contacts. Think of these notes as electronic "Post-It" Notes



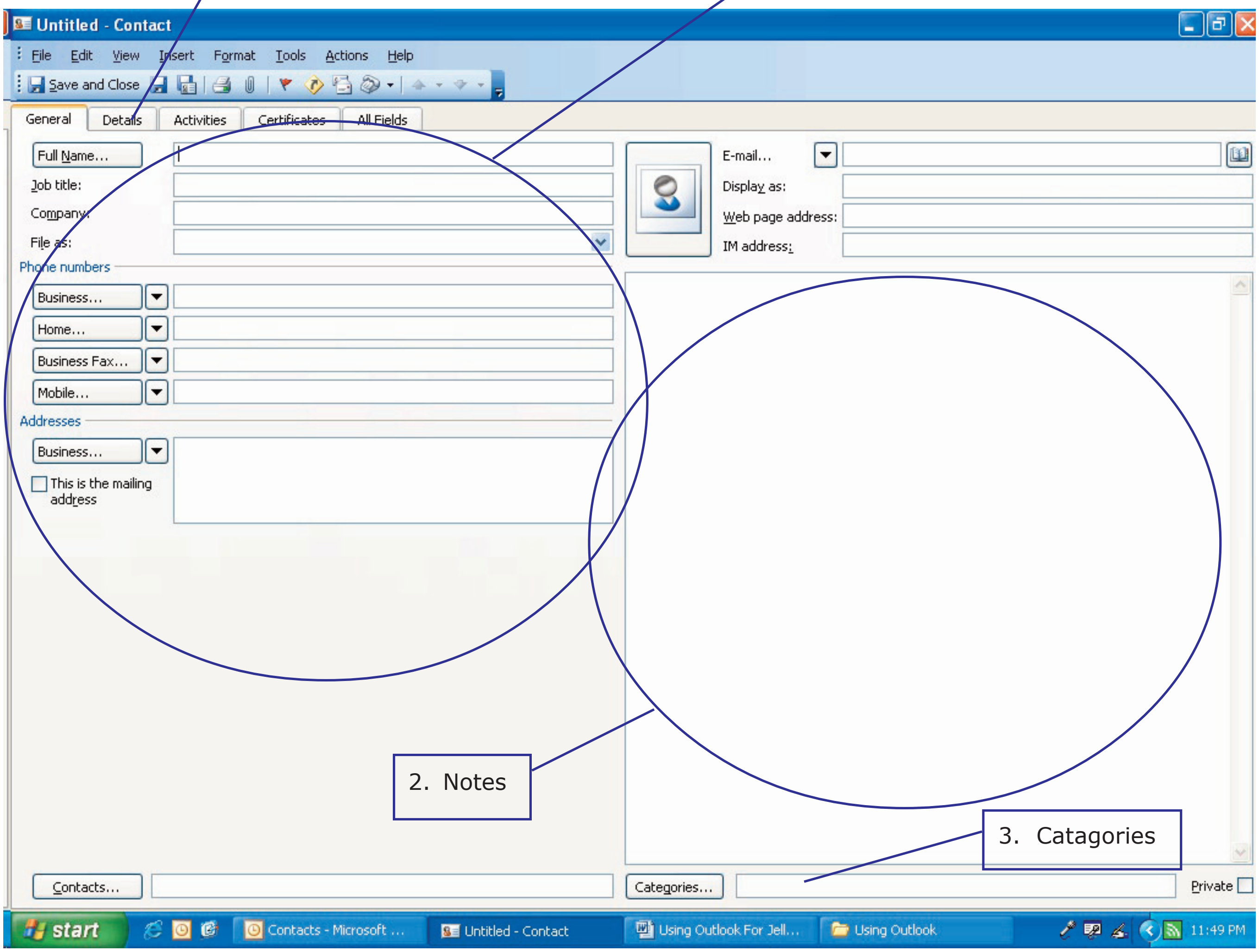
Select Contacts & your contacts appear on the main screen. Typically like the image below. If you have an earlier version of Outlook, the sidebar will not be there, you will need to follow the "select" directions



Next, either double-click a contact you want to change, or select File / New / Contact to create a new contact. You can also click the "New" button at the top left corner of your screen (may be different on your computer).

There are four general areas of Outlook Contacts that we'll want to fill in:

1. Name, Phone Number(s), Address
2. Notes
3. Categories
4. Other Fields – behind the "Details" tab

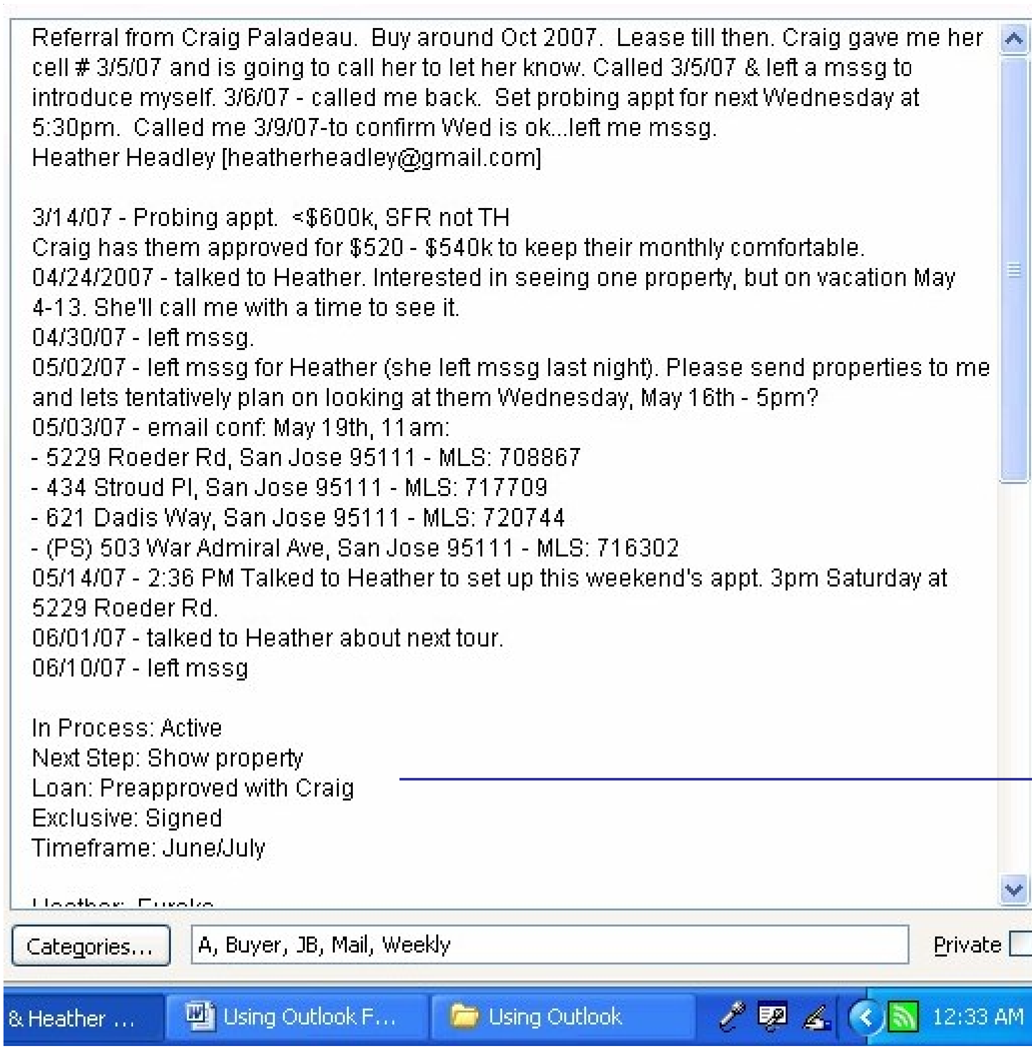


Name, Phone Number(s), Address

1. Be consistent in your formatting (i.e. (408) 999-9999, or 408-999-999, etc)
2. Be sure to put the address in the correct address field (Home, Business, Other – default is Business, but we will generally have Home addresses)
3. Be careful not to add any extra characters (spaces, etc) – particularly, before the information. This can mess up sorting later.

Notes

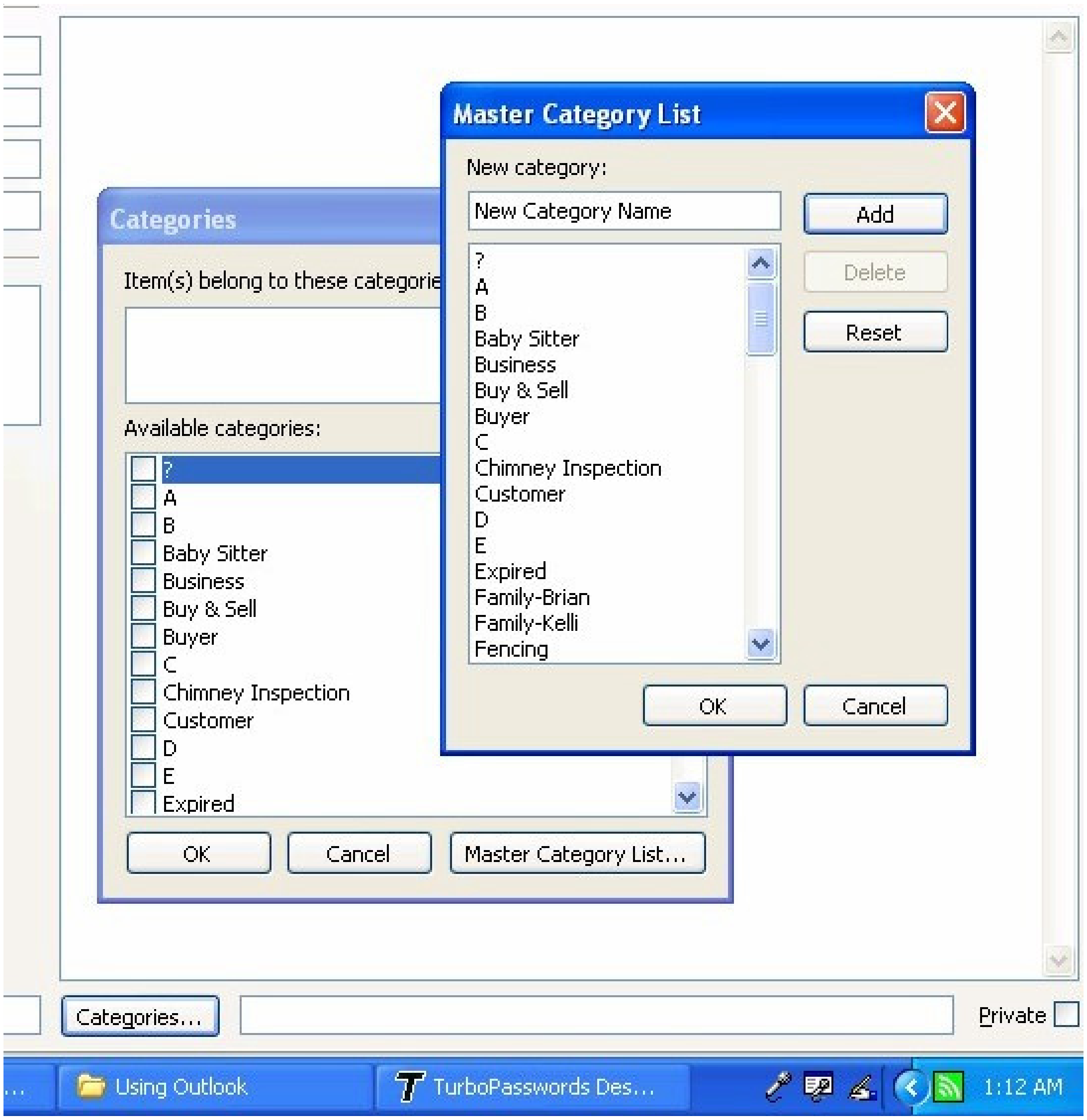
1. Put in everything you can think of right after you first meet the Jelly Bean. This will help you remember them, their likes & dislikes, etc, when you're keeping track of 199 other people as well!
2. Whenever you talk with them, mail them a personal note, leave them a message, meet with them, etc – make note of it in your Notes field.
3. Always, always, always start each note with the date. This makes a great contact log & makes it easy to check information.
    a. **TIP:** When you're making lots of calls & appointments entering the date all the time can be a pain. I bought a little software add-on for Outlook from Sperry Software that automatically adds today's date when I do a certain key combination. This also ensures I enter the date in the same format every time. It cost $14.95, and is available as a download from:
    http://www.sperrysoftware.com/Outlook/Insert-Date-Time.asp
4. You can also have a pre-made template for specific information like the bottom of this note log. Keep it in Outlook **Notes** so you always have it.



Categories:

1. This is what makes Outlook so powerful. Once you have your Jelly Beans in your Outlook Contacts, you'll be able to pull them up in a variety of ways.
   a. Are you going to do drop offs in an area of town you did your 5th Quantum Home Tour™ in? Pull up your Jelly Beans from QHT5, then you can print out the list and you have all the addresses in your hand.
   b. Do you just want a list of all your Jelly Beans? Perhaps to make your calls? Pull them up by the JB category and they're all there.
2. Suggested Categories (I prefer to use shorter names, "QHT1", rather than "Quantum Home Tour™ #1")
   a. JB – this contact is a Jelly Bean
   b. QHT1, QHT2, …which Quantum Home Tour™ I met them at, or door-knocked for. Some Jelly Beans are in multiple Quantum Home Tours.
   c. Weekly or Monthly – If they're doing something sooner than later, I categorize them as Weekly contact. If their timeframe is further out, they're a Monthly contact. This is helpful for determining your Hot Jelly Beans.
   d. Buyer
   e. Seller
   f. Buy & Sell – if they're going to do both
   g. A, B, C or D – completely subjective ranking depending on how serious they are, how soon they intend to do something, and how confident I am that they are "mine".
   h. Visitor / SignPerm or, Walking – I think we need to add these. If they walked into a QHT, they're a Visitor. If we met them door knocking, they are "SignPerm", or maybe "Walking" – I think I'll use "Walking". They may be both, and that's okay.
   i. Mail – this is relatively new for me. Everyone on my monthly mailing will be assigned to this category. I used to mail to all of my A, B, and C people, and my JBs, but it will be easier to just pull up "Mail" and do a mail merge. Alternatively, you can set up a "View" that pulls up all the desired categories.

3. You can create as many categories as you want and also delete the built-in ones you don't want.
    a. Click on Categories button at the bottom of the Contact page
    b. In the pop-up, click on Master Category List
    c. In the next pop-up, type in the new category exactly as you want it, and click on Add.
    d. Click on OK, and your new category will be in the Categories list for you to select/ deselect.



e. TIP1: When assigning categories to a contact, you can pull up the Categories list (as we just did, above), and select/deselect the desired checkboxes. Or, you can just type the Category name (exactly) in the Categories field for your contact. If there's already Categories in the field and you want to add a new one, just put a comma at the end of the list of Categories, then a space, then type in the name of the category.

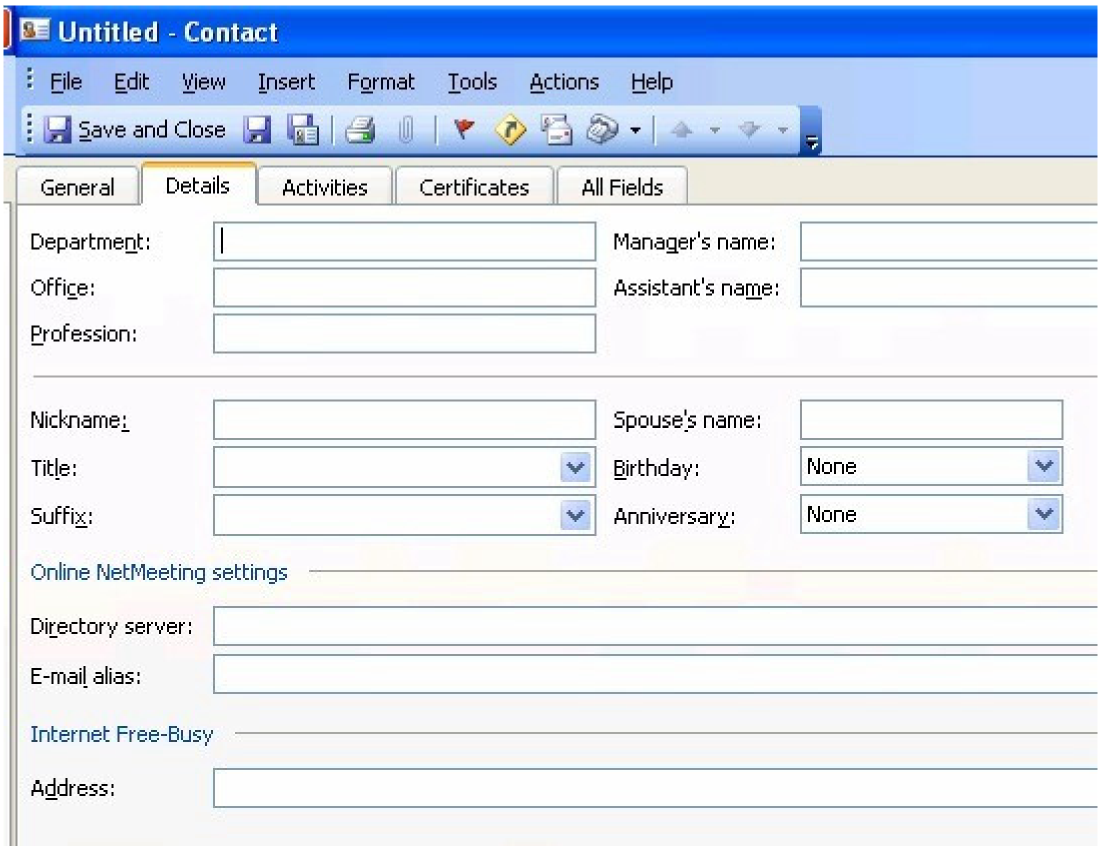
f. For instance, if the contact already has: "A, Buyer, JB, QHT6, Visitor", and they've just walked into your 8th QHT, type in ", QHT8" at the end of the list, and that's one of their categories. Just be sure the category is in your Master Category List.
g. **TIP2:** When you have a long list of Categories and you pull up the Categories list, just type the first letter of the Category you want, and the list will go right to that letter.
h. **TIP3:** If you name your categories _CatName, the underscore will force it to the top of the list.

The Details Tab:

1. We get a little creative here, and use these fields to track information that's not listed in this tab. You'll need to keep track of what each of the fields used is really tracking.
2. Tracking your last contact with the Jelly Bean:
   a. This is the section I use to track when I last contacted my Jelly Beans. There is a Follow Up function built into Outlook, but I've found the pop-ups associated with it annoying, and it doesn't work for me personally.
   b. **Assistant's Name Field** - I use the Assistant's Name field to track the date I last contacted my Jelly Beans. One of the reasons I picked this field is that it's one of the fields that synchs with my Treo cell phone. Therefore, all of my data is available right on my phone.
   c. Using the Sperry Software add-in, I can just click in the Assistant's Name field and put today's date instantly in the field. And since the formatting is always the same, it can be effectively sorted when I look at all my Jelly Beans at once.
   d. **Note:** You could use any of the fields you want in the details tab, just avoid the Birthday and Anniversary fields

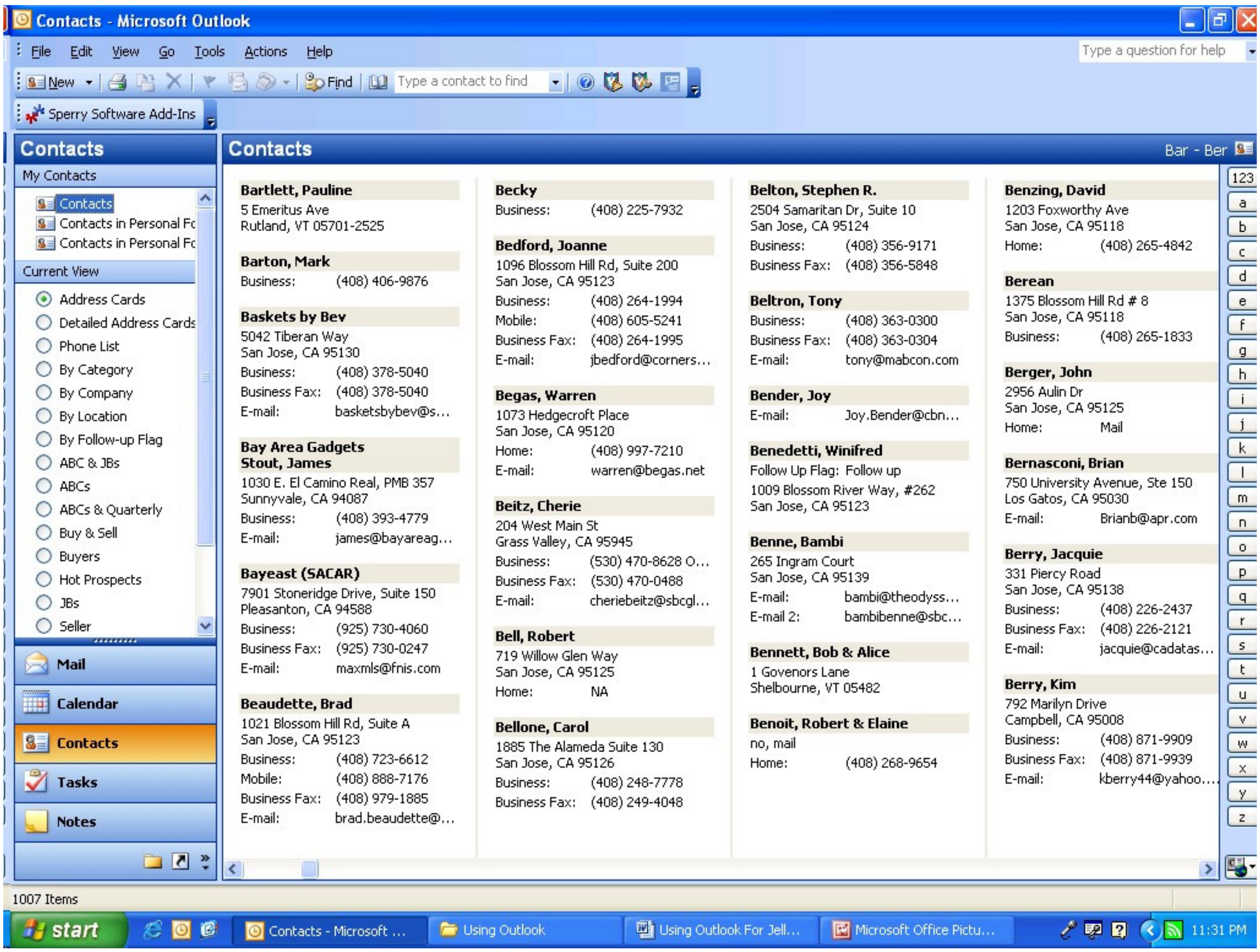
      Be extremely careful about using the Birthday and Anniversary fields. These fields automatically create a *recurring* annual appointment in your Calendar for whatever date you assign. And, even if you change these dates, the original recurring appointment remains! These recurring events show up at the top of the Calendar, which actually pushes your Calendar down on the screen, and makes it very difficult to see.
3. Tracking your Jelly Bean's "Action" Date:
   a. You can select one of the other fields to track when you believe your Jelly Bean will buy/sell
4. Tracking your Jelly Bean's "Met" Date:
   a. It's advisable to use one of the other fields in the Details tab to track the "Met" date – when you met this Jelly Bean.

1. By tracking this information, you'll be able to pull up a list of your Jelly Beans according to:
   a. When you last called them/who needs to be called.
      i. **TIP2:** This is also handy for tracking the number of JBs contacted that week for your weekly report. Just sort by date contacted and count the ones contacted that week.
   b. Who's the hottest Jelly Beans – those whose Action date is coming up soonest. You'll want to add them to your Weekly category.
   c. Track the "incubation" time of your Jelly Beans – from date met to action date.



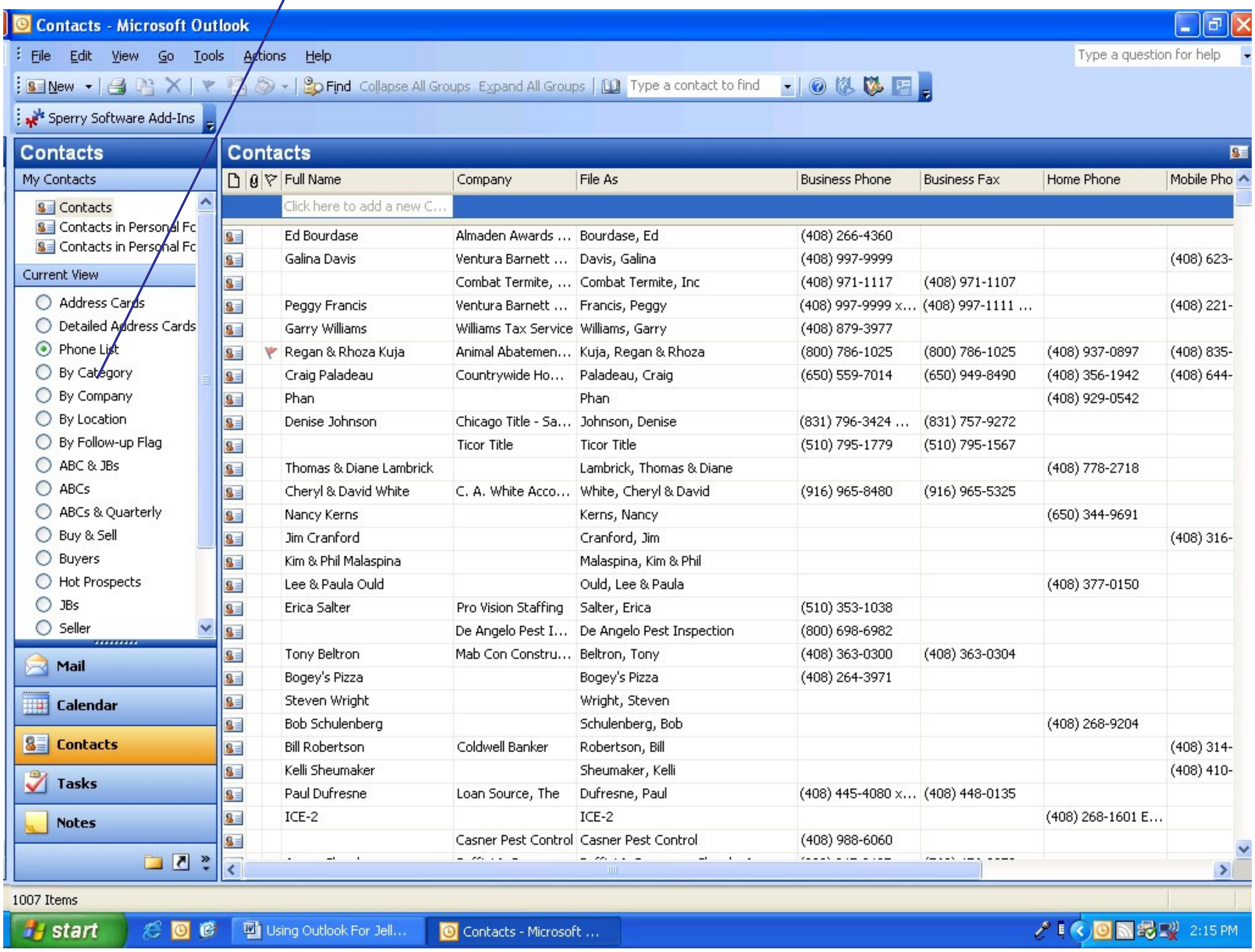
Using all of this information

When you first pull up your contacts, it probably looks like this: This is the default 2003 contacts. You can go directly to the name by clicking on the letter on the right.



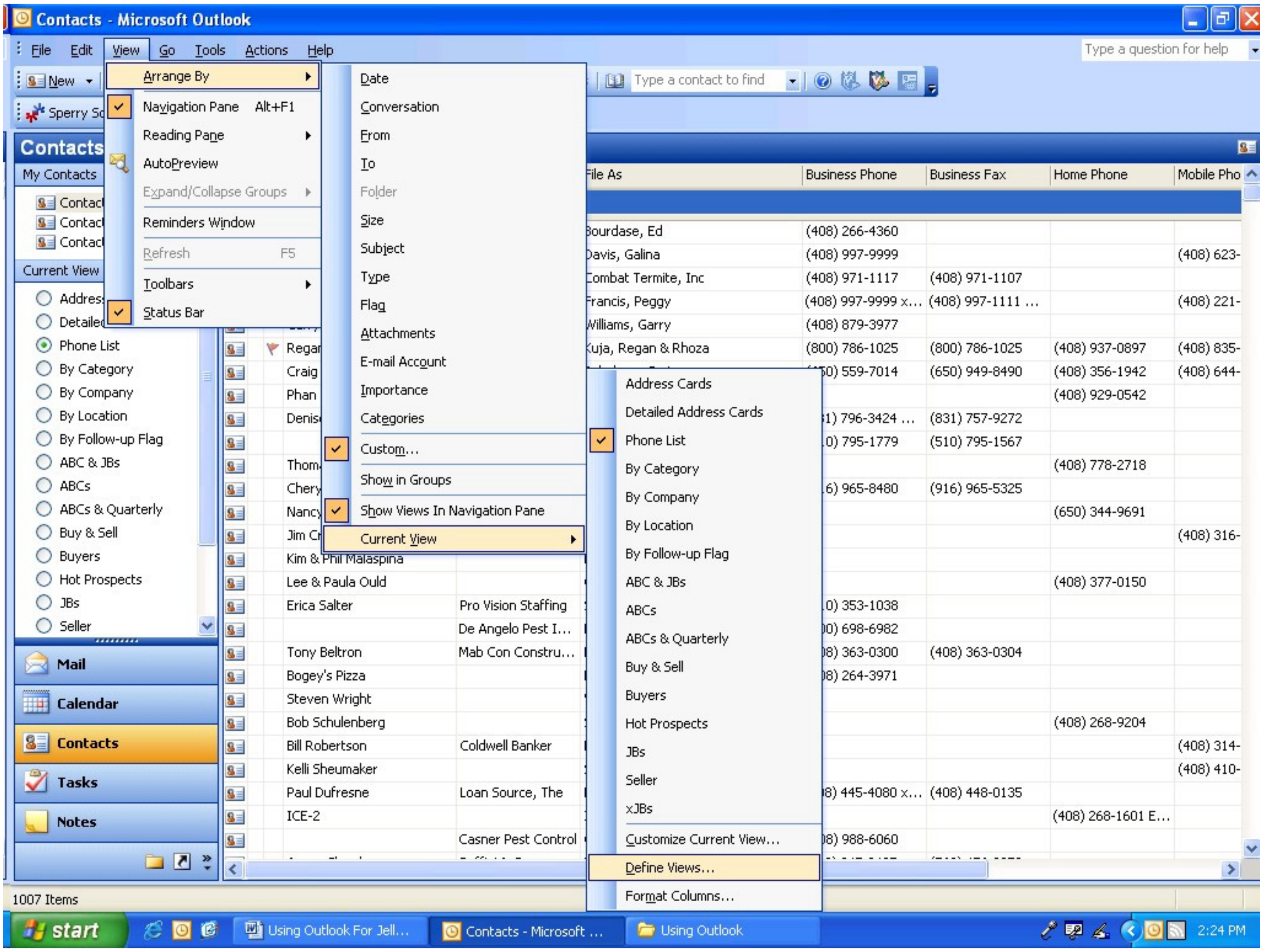
Create a new View to easily see your Jelly Beans:

1. Click on the Phone List view to see your contacts like this:



Many of the Current Views in the list on the right are created ones.

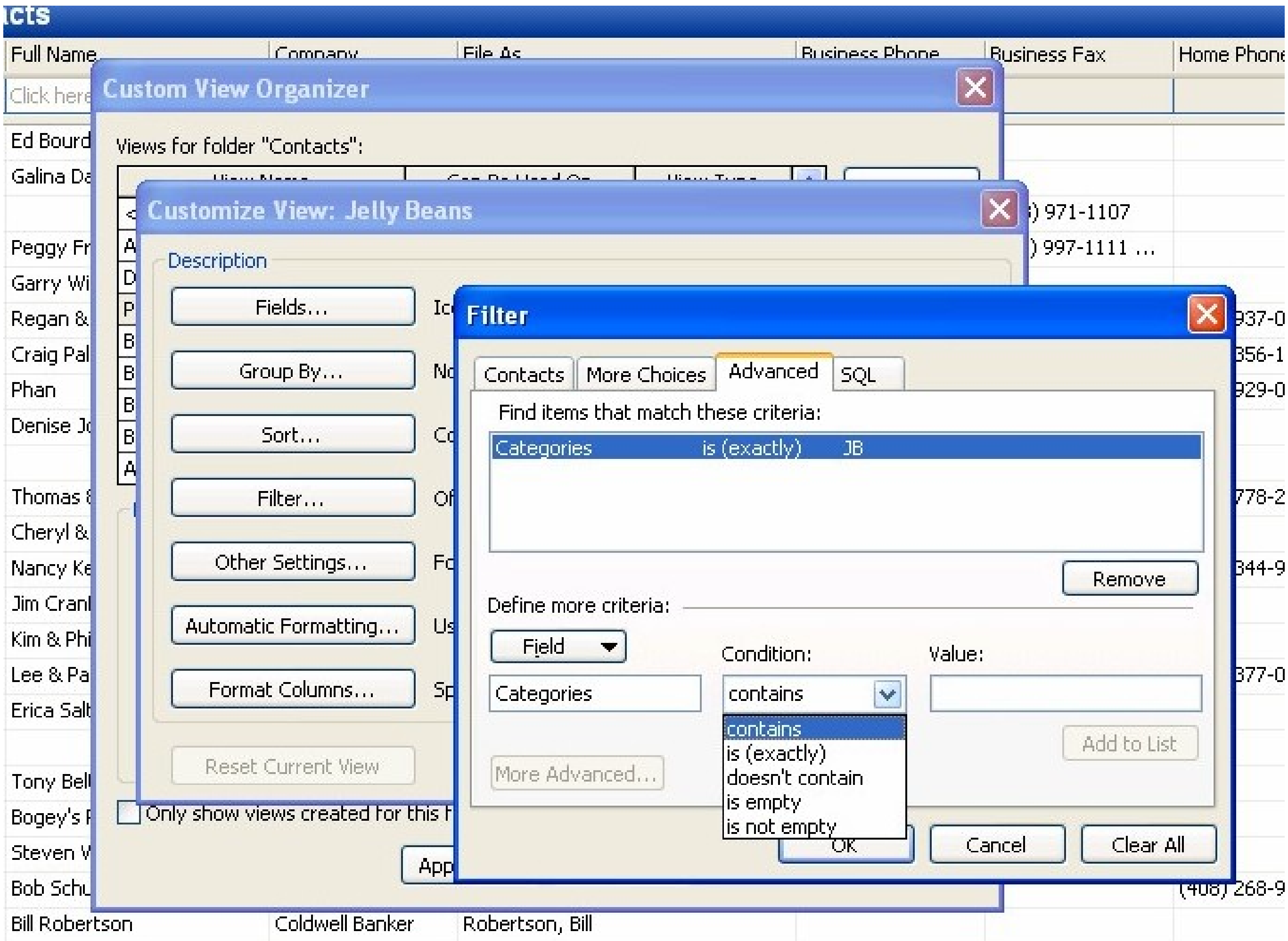
2. Copy and rename the view:
   a. This ability is "buried" deep in the menus, but it is available. Go to View / Arrange By / Current View / Define Views.



   b. The Custom View Organizer comes up. Select the view you want to copy, and click Copy.
   c. In the pop-up window, **type a new name** for your View and click OK.

d. The Customize View pop-up appears. Here you can specify how the new view appears and what information it shows.
   1. Click on Filter, and then the Advanced tab.
   2. Here's where we're going to specify that we only want our Jelly Beans displayed.
   3. Under the Field button, type in "Categories"
   4. Under Condition, select, "is (exactly)"
   5. Under Value, type in "JB"
   6. Click the "Add to List" button to add this condition to your View.

   You can add more conditions to this or future lists to further refine who/what is displayed.



7. **Note**: Conditions are handled as a logical "OR". For instance, if you Filter by "JB" and "Weekly", all the contacts categorized as either "JB" OR "Weekly" are displayed.
8. **Note**: be careful of the "contains" Condition. Both categories, "B" and "Buyer" *contain* the letter "B". If you want to pull up the category "B", use the condition "is (exactly)" B, not "contains" B.
9. **Note**: If you make a mistake or no longer want a criteria in your list, click once on it to highlight it, then click Remove.

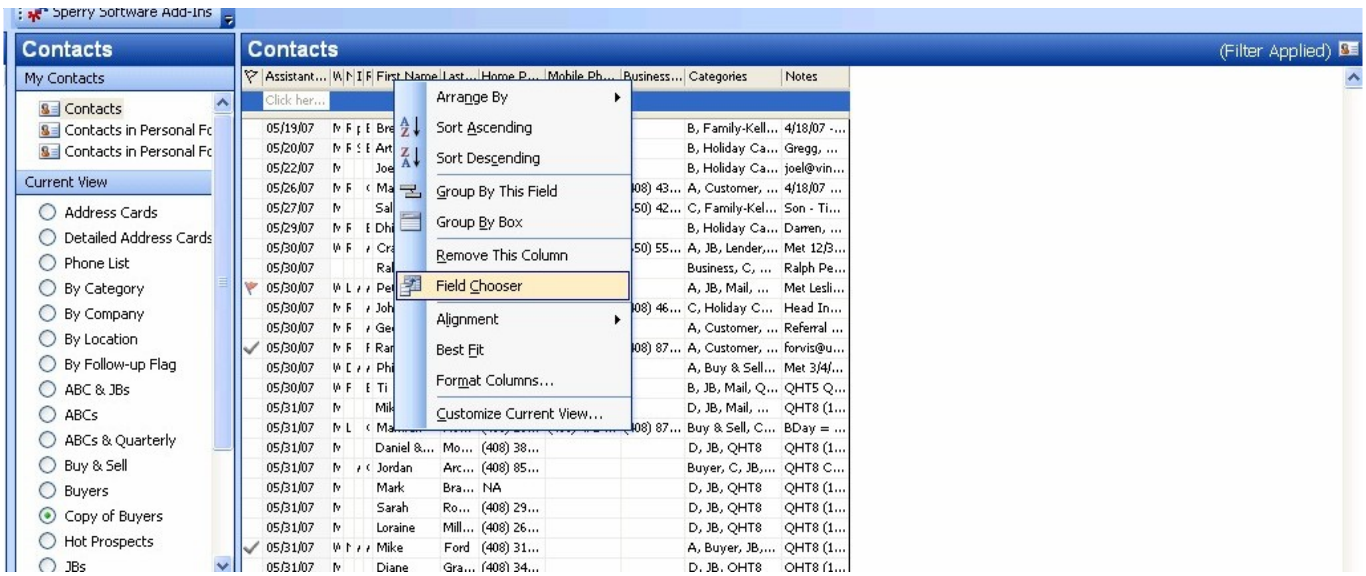
10. When you're done with your criteria, click OK to close the Filter pop-up.

b. In the Customize View screen, click on Sort
    1. At the bottom left of the next pop up, select All Contact Fields from the "Select Available Fields From" drop down list.
    2. At the top left of the pop up, select "Assistant's Name" from the "Sort Items By" drop down list.
    3. Select OK
    4. Select OK again
    5. At the Custom View Organizer, click Apply View

c. You now have a customized view showing all your Jelly Beans, sorted by your last contact with them.

d. **Note**: you can later use this new View, Jelly Beans, as your template to make other views for your Jelly Beans. You can make a bunch of Views – show those Jelly Beans who are most Active, only Buyers, only Sellers, those that are going to Buy & Sell, etc…

3. Sorting:
    a. By clicking on a header, you can sort by that Field. Clicking on that header again, will reverse the sort order (ascending / descending).



4. We could have changed the Fields displayed in the Customize View pop up window when we were creating our new View. But we can also do it now.
    a. Right-click on any field name (header) at the top of our Jelly Bean list view. This brings up a list of actions for us to pick from.
    b. Select "Field Chooser".
    c. At the top of the Field Chooser pop-up, select All Contact Fields. This displays only Contact Fields for us to choose from.
    d. Select First Name, and drag it between whichever Field headers you want it in. When you unclick (let go) it's now one of your field headers.
    e. Repeat for Last Name, or whatever fields you want.
    f. To remove any unwanted fields from the list, just grab that header and drag down into the list and let go. That header is removed.

Conclusion:
This will get you started, but there's a lot more in Outlook. Experiment with it. You can find answers to some questions by looking them up on the internet as well.
Get started using Outlook.

"Anything worth doing is worth doing POORLY"
Remember a hundred years ago we were poorly flying planes.
Fifty years ago we were using computers poorly.

It gets better by starting and getting better bit by bit.

Go Get 'Em

TRAINING #15

TRAINER NOTES

Purpose:

Demonstrate using a system that you can manage.

The impulse is to hunt for or even worse, try to force, the client to write tomorrow morning at 9AM. The better way to run a long-term business is to drive and manage the system. (Scientific Marketing)

We need to understand the “funnel” concept of lead migration.

You must know where you are now and what your focus is at that point.

BEGIN:

Diagram on the flipchart:
Notice this diagram is NOT to scale!

Every person on the Planet

200 Jelly Beans

Focus on: QHT™ and Collecting JB’s, All the while making appointments with existing JB’s

6-8 On-Deck

Focus on: Keeping in very close contact with your probed people Making sure you always have 3 Probing™ appointments per week.

3 Certified Buyers/Sellers

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

Escrow

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

Get PAID $$

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

TRAINER NOTES

Notice that number of items at each level gets smaller:

6 Billion People on the Planet
200 Jelly Beans
6-8 prospects (On-deck)
3 C-B/S
2 Escrows
1 Get Paid

Not every person makes it to the next level. Expect fallout and plan for it.

At the mature stage, when your JB jar is mature and you start getting people into escrow, your focus NEVER changes:
Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

It is the Probing™ appointments that drive the on-deck, which then drives the C-B/S, which then drives the escrows.

Remember: Escrows take care of themselves. They will let you know what to do and you will find a way to do it. You cannot ignore it; it will come find you.

Certified buyers and sellers are the same way.

It is losing your focus on making three Probing™ appointments that will flat-line your business.

SCENARIOS:

New: **Under 100 JB's with a CB**

{think of it as Accidental business!]
Still need to have primary focus on getting to 200 JB's

Intermediate: About 200 JB's with NO CB

Relentlessly call the JB's with intention to get a Probing™ appointment. Use long-term Needs analysis and Strategy.

Intermediate/advanced: about 200 JB's with 2-3 CB or escrows with less than 6 on-deck.

This is classic engineering a flat line. Needs to focus immediately on getting 3 Probing™ appointments per week. Escrow will close and you will have to start over!

TRAINER NOTES

Advanced: Getting close to graduation.

Needs to be at 200 JB's with 50-75 turned over (replaced) 2-3 Probing™ appointments per week – FOR LIFE Will drive you to level production rather than bouncing and starting over.

BACK TOGETHER:

Ask for commitments that will take the person to the next step.
Be directive. They may not know what they need to do. Don't let them be wimpy.

If they are in the under 200 JB' they must commit to 10 per week.
They can take whatever comes into the QHT™ and add the best of the door-knocking contacts to get to ten.

If the time is slow at the QHT™ – ask them to call the best of the Door-knocking and invite them over.

Make sure they commit to talking with and asking for a Probing™ appointment from every jellybean every time they talk.

If they are in the Advanced group, make sure they validate their on-deck and Committed buyers and sellers with you.

ASK:

"What did you learn from your work?
What are you going to do about it?"

TRAINING #16

TRAINER NOTES

This is a Group 4-5 exercise for Triage

Purpose:

When folks are getting lots of appointments week after week, but do not get to Certified buyers and Listings it is because they are doing drop-off appointments over and over. They are talking with their jelly beans and being social.

They need to ask for and get appointments to probe. The purpose of the probing session is to determine what their plans are (Short term, medium term and long term) and craft a strategy to work with them till they get there. The strategy includes the agent.

Often the problem is their intention. If their intention is still at making so many contacts every week, then they are not focused on asking for appointments to probe. When they make their 50 contacts, they fell like they're done.

STEP ONE:

You model it.
Get a volunteer to be your drop off or Jelly Bean call. Give them their motivation (a la Spielberg) They are to be thinking of moving up in about 9 months or so.

Get to chatting with them about the kids, the garden, what's been happening…. Then ask about what they're thinking about in terms of the new house we talked about. How is the present house being too small (or too large) working for them. Use the language: "I work with my clients at their own pace" "I would never want you to feel like I am pushing you to do something before you are ready to move on it."

Then your script for asking for the probing appointment.
Make sure the person resists the appoint at least once.

STEP TWO:

Get a discussion about the role play.

What made it work? What was the order of the conversation? What was the intention? What is the benefit to the customer of th probing appointment?

TRAINER NOTES

STEP THREE:

Get them into groups. Two-by-two is best.
Write their own script. Use their own words.
We ar going to use all of their thoughts put together to get ideas. So don't worry about being perfect. We'll get there later.

Have them read aloud their scripts.
Write the salient benefit to the customer on the flipchart.

Talk about the benefits. See if there are any more you can add.

Encourage them to plagiarize. No one will hear the speech form tow people. Even if they use the same words exactly, no one will ever know!

With the benefits on the board, have them re-write their script.
(about 15 minutes)

Now read them to your partner and give feedback. Your partner's challenge is to see if you can make it just a little better.

Read them aloud.

STEP FOUR:

Challenge them to use it a number of times during the following week. Write down their agreements. (ten is a minimum)

They can use it at every drop by and at every jelly bean call they make. If they are making calls to their jelly beans, all of them cannot have had a recent probe.

Check on the results next week

EXAMPLE:

"You know, . .
The process of (buying or selling) real estate has a LOT of problems (or obstacles issues, difficulties) along the way. It can be one of the most frustrating things you will ever encounter. We can smooth the path by anticipating problems and dealing with them early rather than later....one of the things that I do for people I work with is a process that helps them clarify their needs and uncover those problems so that together we can craft a strategy to get them (over under around through) the problems to what they want. Without a comprehensive strategy, a lot of buyers will end up settling for the house they can get instead of going after the home they really want. (and could have had!) Because buying a house is much more than just a financial decision… it will affect every aspect of your life: Your family, your job, where you buy your groceries… And while the financial and physical aspects of Real Estate are HUGE, the emotional undercurrents are bigger, (or much more important,) and most often overlooked.

So when would be a good time for us to get together this week and begin that process?"

TRAINING #17

Video Courtesy Russ Orchard

TRAINER NOTES

The Escalator
[This discussion is best for the Masters group. They are the ones stuck in their old ways]

Begin:
Play the DVD

Discussion:

Are these people Stupid?
What could they do instead of what they do? How do you know that and they don't?
What if having the escalator going UP is the *only* model they have for getting upstairs?
What about the Fix-it guy? How helpful was he?
Did he have any real insight into the problem? Why not?
How can they get out of this pickle?
Suppose they thought that going up on the escalator meant they had a special skill?
Suppose they thought it made them special?
Where did they look for the solution to the "Problem?"
Why did they look there?

What does this have to do with real estate?
If the Fed would lower the interest rate, would that save you?
Are you sending out more mailings because that is what worked before?
Do you think more advertising will make it different?
How many of you have seen a real estate market that went down (or not UP?)
When the market was brisk and there were multiple offers on your listings, did that make you feel special and skilled?
Where do you look for a fix for the drop in your production?
If you looked to your own power, what would you need to do?
What do you need to do differently to adjust to the reality?

Play the DVD again.