



TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name _____

Date _____

Section I Attendance

Number of people in cluster _____
 Number present _____
 Number excused _____
 Number no show _____
 Total (Must balance) _____

Names of no shows

1. _____
2. _____
3. _____
4. _____
5. _____

Section II Results

Number of escrows opened _____
 Number of escrows closed _____
 Number of listings taken _____

People not making standard

1. _____
2. _____
3. _____
4. _____
5. _____

5 min

Section III Time Management

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system
<input type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)
<input type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked
<input type="checkbox"/>	<input type="checkbox"/>	Logging P I N's
<input type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs)
<input type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs)

People off of TM System

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

10 min

Section IV Review Week

- Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file

Lead name Phone number Address Agent's name Quantum Home Tour™ name

- Prepare all new clients on for Buyer Certification group
- Re-Certify all Certified Buyers and prepare for Certification group

10 min





TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST (cont'd)

Section V Analysis

Identify to Which Group Individuals will be going

- Open Houses _____
- Fliers passed out _____
- Names & numbers collected _____
- Appointments made _____
- Certified Buyers _____
- Assign to Group \rightarrow - (R) -

People not holding QHT's or O.H.'s

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

(Schedule to Triage Group)

Names of people with no appointments

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Group 1

Work 1:1 on phone script

People with appts but no Certified Buyers

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Group 2

Work 1:1 on Probing

These Sections are filled out in Cluster Groups

Section VI Plan of Action - to set 4 appointments for week

1. Each person takes out Daily work planner for Monday.
2. Look at each lead & plan next step.
3. Look at each client to see what has to happen to put transaction together.
4. Verify that each individual is using appointment technology.
5. Review how to handle Quantum Home Tour™ leads.
6. Make sure appointments are showing up or need confirming calls.
7. Role play floor time appointments.

30 min

Section VII Taking Action

1. Direct to leave and commit to complete action.
2. Work with partner to complete calls & take action
3. Purpose of Action Monday™ is to line up week
 - *Set 4-6 appointments to drop by/probe
 - * Have 3 Certified Buyers
 - * Set 2 appointments to show property
 - * Write 1 offer

People needing special attention

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

5 min



**QUANTUM
MANAGEMENT
SYSTEMS**