

NAME (STICKER)



GREEN FOR TRANSACTIONS CLOSED
BUY & SELL



MISS LATE = 1/2 MISS
MISSES & LATES
(4th MISS - 6 MOS.
OUT OF PROGRAM)



4 + MONTHS
NO TRANSACTIONS

SELL TRAINING

PROBING

QHT





Training Completed
 Green SELL : Blue PROBING : Yellow OHT

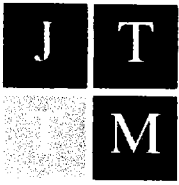


ATTENDANCE
 Full dot for a miss / 1/2 for late

Start Date 6/3/2004
 Red dot for each 4 months without Closings



Closed Transactions
 Full dot for each closed transaction



Team Report

SAMPLE TEAM LEADERS REPORT FROM TEAM MEETINGS



QUANTUM
MANAGEMENT
SYSTEMS

J T M * This is your agenda; check off *

TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name Ima Starr

Date 9/29/03

<p>Section I Attendance</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Number of people in cluster</td> <td style="width: 10%; text-align: center;"><u>8</u></td> <td style="width: 30%; text-align: right;"><u>12</u></td> </tr> <tr> <td>Number present</td> <td style="text-align: center;"><u>2</u></td> <td></td> </tr> <tr> <td>Number excused</td> <td style="text-align: center;"><u>2</u></td> <td></td> </tr> <tr> <td>Number no show</td> <td></td> <td></td> </tr> <tr> <td>Total (Must balance)</td> <td></td> <td style="text-align: right;"><u>12</u></td> </tr> </table>	Number of people in cluster	<u>8</u>	<u>12</u>	Number present	<u>2</u>		Number excused	<u>2</u>		Number no show			Total (Must balance)		<u>12</u>	<p>Names of no shows</p> <ol style="list-style-type: none"> 1. <u>Emma Lost</u> 2. <u>Gonna Fishkin</u> 3. _____ 4. _____ 5. _____ 						
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<p>Section II Results</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Number of escrows opened</td> <td style="width: 10%; text-align: center;"><u>3</u></td> <td></td> </tr> <tr> <td>Number of escrows closed</td> <td style="text-align: center;"><u>1</u></td> <td></td> </tr> <tr> <td>Number of listings taken</td> <td style="text-align: center;"><u>2</u></td> <td></td> </tr> </table>	Number of escrows opened	<u>3</u>		Number of escrows closed	<u>1</u>		Number of listings taken	<u>2</u>		<p>People not making standard</p> <ol style="list-style-type: none"> 1. <u>Irma Looser</u> 2. <u>Bobby Bust</u> 3. _____ 4. _____ 5. _____ <p style="text-align: right;">5 min</p>												
Number of escrows opened	<u>3</u>																					
Number of escrows closed	<u>1</u>																					
Number of listings taken	<u>2</u>																					
<p>Section III Time Management</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Yes</th> <th style="width: 10%;">No</th> <th style="width: 80%;">* Check off as addressed *</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Check to see agent is using system</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Check monthly calendar (scheduled events)</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Daily work planner for every day worked</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Logging P I N's</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Check "I" time (15-20 hrs) 30%</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td>Check "P" time (10-15 hrs) 7-10</td> </tr> </tbody> </table>	Yes	No	* Check off as addressed *	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Logging P I N's	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs) 30%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs) 7-10	<p>People off of TM System</p> <ol style="list-style-type: none"> 1. <u>Conrad Fuzed</u> 2. <u>Otto Control</u> 3. <u>Clew Less</u> 4. _____ 5. _____ 6. _____ <p style="text-align: right;">10 min</p>
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<p>Section IV Review Week * Check off as addressed *</p> <p><input checked="" type="checkbox"/> Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Lead name</p> <p>Phone number</p> <p>Address</p> <p>Agent's name</p> <p>Quantum Home Tour™ name</p> </div> <p><input checked="" type="checkbox"/> Prepare all new clients on for Buyer Certification group</p> <p><input checked="" type="checkbox"/> Re-Certify all <u>Certified Buyers</u> and prepare for Certification group</p> <p style="text-align: right;">10 min</p>																						



**QUANTUM
MANAGEMENT
SYSTEMS**

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

** Check off as completed **

Section V Analysis

Identify to Which Group Individuals will be going

- Open Houses / OHs
- Fliers passed out
- Names & numbers collected
- Appointments made
- Certified Buyers
- Assign to Group ① ② ③ ④

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

1. Larry Lethargic
2. Danny Dreamer
3. _____
4. _____
5. _____

(Schedule to Triage Group)

Names of people with no appointments

1. Danny Dont
2. Sally Should
3. Gotta Go
4. _____
5. _____

Group 1

Work 1:1 on phone script

People with appts but no Certified Buyers

1. Harry Hopen
2. Wendy Wish
3. Lola Like-me
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

This is group activity for cluster

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. _____
- Names of people needing triage*

5 min

