



# JTM FORMS AND SCRIPTS

*A Fresh, Effective Approach to Recruiting and Training New Agents*

## THE JOURNEY TO MASTERY™



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JTM Forms & Scripts  
For Memorization

# The Journey To Mastery™ Forms

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\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date

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License Granted By \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date

# JTM Group Zero Responsibilities

Your designation in Group Zero is designed to help you identify your starting position in a total of 6 groups. You can recognize your progress to graduation and production, by the group you qualify to participate in. Each group is based on a growth curve and a measured level of activity, which will predict both your current probability of success and indicate your next set of relevant steps in the training process.

Your job is to get out of the group you are in; not because it is a “bad” group, but rather because it describes your growth and is part of the growth process; in other words, no change, no growth.

Each of the following items is a condition for your participation and indicates you understand what is necessary to complete Group Zero so that you will be able to begin your participation in real estate activities.

You agree that:

- I will be on time at the Quantum Home Tour™ location for my assignments.
- I will be on time for appointments I make with the Quantum Home Tour™ Leader.
- I will be Presentable and Professional in appearance and actions at all company events, including Action Monday™; also I
  - WILL NOT smoke before or during Quantum Home Tour's™
  - WILL NOT wear perfume or cologne at Quantum Home Tour's™
  - WILL wear attire appropriate to impart a professional image
  - I WILL be open to feedback about my image in the interest of making money and fitting into the company.
- As a Group Zero Trainee, I will not greet or associate with visitors. I am in an observer status while in Group Zero.
- I will save my questions for the Quantum Home Tour™ team while the team is working. My questions will be addressed at the end of the day. Their priority is to greet and work with customers who visit the Quantum Home Tour™. My training will be done in a structure just like the one I am observing to ensure that I am getting the same hands on support and training.
- I will observe and be as unobtrusive as possible and let the Quantum Home Tour™ team do their job.
- I will be available and willing to assist agents with anything required of me.
- I understand there are no unexcused absences for Action Monday™ or Call Night. I am eligible for 4 absences before termination and may use them in any way I choose. On the fourth absence, I am automatically agreeing to separate from the company without further discussion or protest.
  - o A late equals half a miss.
  - o Showing up on time to the training is part of learning time management with my client and discipline for my own production.
- I will have my Action Monday™ paper work ready prior to the start of Action Monday™. I agree not to come into the room and complete incomplete paper work. I agree to complete all paperwork outside of the room and if I bring into the room, I understand that I will be ask to go out of the room and complete. I further understand that if paper work is not completed by 10:00am for Action Monday™ it is the same as being late.
  - o Paper work done is part of the training and discipline around completing paper work for my client.
- I will be sure to write my name on my materials (scripts books, personal items, etc.)
- I will meet with my loan officer on my first Action Monday™.
- I understand that there is a checklist associated with this foundation and I understand that it is my responsibility to see that each item is completed within 2 weeks of the start of my participation in Action Monday™. Any delay shall be my responsibility and I will initiate and call attention to any delay with my Action Monday™ manager.
- By signing this agreement, I am committing to the above standards and procedures as a participant in Group Zero..

Signature\_\_\_\_\_

Date\_\_\_\_\_

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Signature \_\_\_\_\_

Date \_\_\_\_\_

# Weekly Schedule

AGENT NAME: _____	WEEK BEGINS: _____
OFFICE: _____	_____

**SUMMARY OF LAST WEEK:**

# of Open Houses \_\_\_\_\_ #Leads \_\_\_\_\_ #Drop by \_\_\_\_\_ #Probes \_\_\_\_\_ #Write offer \_\_\_\_\_ #Open Escrows \_\_\_\_\_ # Closed Escrows \_\_\_\_\_

**TIP ANALYSIS:** #T \_\_\_\_\_ %P \_\_\_\_\_ %I \_\_\_\_\_ %N \_\_\_\_\_ Avg. Hrs. Day \_\_\_\_\_ Avg. N hrs Day \_\_\_\_\_

Date	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							

	Client/Phone	Type	Day	Time	Next Step	Day	Time	Next Step
1								
2								
3								
4								
5								
6								
7								
8								

	Scheduled Open House Addresses	Date	Time
1			
2			
3			

# Committed Buyer Checklist

<b>For</b>	<b>Company</b>
<b>Client</b>	<b>Date acquired</b>
<b>Date called</b>	<b>Appointment Date:</b>
<b>Open house</b>	<b>Address</b>
<b>Work phone ( )</b>	<b>Home phone ( )</b>

**CLIENT SOURCE:**  
 Open House.....a  
 Floorcall.....b  
 Sphere of Influence...c  
 Cold Call.....d  
 Farm.....e  
 Mailout.....f  
 Community.....g

Let me review with you how I work. I don't work with every potential buyer, but the clients I do engage with, MUST be committed to producing results.

**PHASE ONE - BUYER INTERVIEW**

- YES NO **WE HAVE AGREED:**
- 1. To have all decision makers present in person.
  - 2. To spend at least 45 minutes in interview.
  - 3. To come to an agreement on what you're looking for.  
 (1) \_\_\_\_\_  
 (2) \_\_\_\_\_  
 (3) \_\_\_\_\_
  - 4. That I am your exclusive agent and I represent you.
  - 5. (Buyers agreement attached)
  - 6. That you will be **pre-approved** by \_\_\_\_\_ for \$ \_\_\_\_\_
  - 7. That you are prepared to buy now.
  - 8. Date/time of next appointment.  
 \_\_\_\_\_
  - 9. That we will be in communication.
  - 10. Buyer is prepared to make a decision on property and to make an offer.

**PHASE TWO - SHOWING PROPERTY**

Again, I don't work the way most agents do. I only want to show you properties that are meaningful and fit your needs.

- 1. Pre-write offer and have on clipboard before showing property.
- 2. Show 3 properties.
- 3. Bring back to office for debriefing.
- 4. Write offer.(Go to 3A)
- 5. Re-interview to redefine needs and identify where communication broke down.(Go to 3B)

**PHASE 3A- SHOWING PROPERTY**

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

**PHASE 3B-SHOWING PROPERTY**

- 1. Re-establish needs \_\_\_\_\_
- 2. Identify what got in the way \_\_\_\_\_
- 3. Show 3 properties.  
 (1) \_\_\_\_\_  
 (2) \_\_\_\_\_  
 (3) \_\_\_\_\_
- 4. Bring back to office for debriefing.
- 5. Write offer.  
 (Go to 4A)
- 6. Make appointment with manager (date/time) \_\_\_\_\_  
 (Go to 4B)

**PHASE FOUR4A - MANAGEMENT SUPPORT**

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

**PHASE 4B-MANAGEMENT SUPPORT**

- 1. Re-establish relationship with manager present.
- 2. Identify what got in the way with managers assistance.
- 3. Show 3 properties.  
 (1) \_\_\_\_\_  
 (2) \_\_\_\_\_  
 (3) \_\_\_\_\_
- 4. Bring back to office for debriefing.
- 5. Write offer.(Go to 5A)
- 6. Discontinue working with client.(Go to 5B)

**PHASE 5A**

- 1. Present offer.
- 2. Countered.
- 3. Accepted.
- 4. Set financing appointment and give completed file to escrow specialist.

**PHASE 5B**

- 1. Help client understand that he/she is not a buyer now. Establish when they are.
- 2. Put on follow-ups and mailing list.



**QUANTUM MANAGEMENT SYSTEMS**

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# Exclusive Client Agreement

In exchange for you as an agent/broker company, working in finding a property for me, I agree to work **exclusively** with you, to the exclusion of any other broker/company and agent, for a period of \_\_\_\_\_ days. Also, I understand that you may present offers on my behalf for property offered as “For Sale By Owner”.

I understand that I may continue to look at other properties, open houses, and responding to advertisements provided that I inform other parties that I am currently employing you as my agent/broker company and will identify you as my exclusive agent.

As the agent under this agreement, you will provide me exclusive information on all properties requested by me that are obtained by seeing other properties, open houses and advertisements. You agree to represent me and my interests.

Business Cards Provided

\_\_\_\_\_

Clients

\_\_\_\_\_

Date

\_\_\_\_\_

Agent

\_\_\_\_\_

Broker

# Client Needs


**O.E.-Directives**

1. Describe for me
2. Tell me about
3. What are your attitudes about
4. What are your feelings concerning
5. What would your feelings be if

**MODIFIERS**

- What
- When
- Where
- Why
- How

**TAG- (Crystallization)**

What does \_\_\_ mean to you?

**SUMMARY**

1. It appears that \_\_\_
2. So what you are telling me is \_\_\_
3. If I understand correctly \_\_\_
4. What I hear you saying is \_\_\_

**CLOSED END**

1. So one of the things you are looking for is \_\_\_\_\_
2. The thing that is important is \_\_\_\_\_

**PROBING TIME**

1. Introduction
2. Permission
3. Grid/Pool
4. Summarize needs
5. Set up next step

**ISSUES:**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.

# Action Monday Agent Report

**AGENT NAME:** \_\_\_\_\_

**MENTOR :** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**SECTION I ATTENDANCE** (circle one)

Present / Excused / Unexcused

**SECTION II TIME MANAGEMENT**

- Weekly Schedule
- Tip Analysis
- 20 Hours Prospecting
- 8 Appointments
- 2 Quantum Home Tours™ Scheduled

**SECTION III ACTIVITY**

Number of Quantum Home Tours™ held: \_\_\_\_\_

Names & phone numbers collected: \_\_\_\_\_

Number of appointments from Quantum Home Tour™: \_\_\_\_\_

Number of Drop By appointments from Quantum Home Tour™: \_\_\_\_\_

Total Number of appointments: \_\_\_\_\_

Number of new clients/prospects this week (list) or (see new prospect roster): \_\_\_\_\_

- |                |              |                |               |
|----------------|--------------|----------------|---------------|
| 1. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 2. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 3. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 4. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 5. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 6. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |

Number of Listing Presentations Made: \_\_\_\_\_

Number of Certified Buyers™ total (list): \_\_\_\_\_

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

**SECTION III RESULTS**

Number of new escrows open this week: \_\_\_\_\_

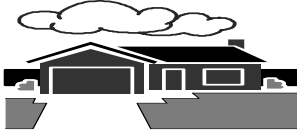
Number of escrows open total: \_\_\_\_\_

Quantum  
Home Tour™

The Journey To  
Mastery™  
Quantum Home  
Tour™  
Forms



# Quantum Home Tour™ Guest Register



AGENT: \_\_\_\_\_  
 DATE: \_\_\_\_\_  
 ADDRESS: \_\_\_\_\_

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
 PHONE # \_\_\_\_\_ EMAIL \_\_\_\_\_  
 OCCUPATION \_\_\_\_\_

**Your first visit?** Yes  No   
**Do you:** Own  Rent   
**When do you need a home?**  
 Now  1-3 Months  3-6 Months   
**How did you hear of us?**  
 Friend  Driving by  Newspaper   
 Signs  Radio  Other

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
 PHONE # \_\_\_\_\_ EMAIL \_\_\_\_\_  
 OCCUPATION \_\_\_\_\_

**Your first visit?** Yes  No   
**Do you:** Own  Rent   
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 Now  1-3 Months  3-6 Months   
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 Friend  Driving by  Newspaper   
 Signs  Radio  Other

NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
 PHONE # \_\_\_\_\_ EMAIL \_\_\_\_\_  
 OCCUPATION \_\_\_\_\_

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 Signs  Radio  Other

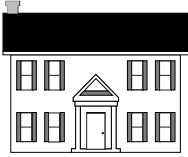
NAME \_\_\_\_\_  
 ADDRESS \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
 PHONE # \_\_\_\_\_ EMAIL \_\_\_\_\_  
 OCCUPATION \_\_\_\_\_

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 Now  1-3 Months  3-6 Months   
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NAME \_\_\_\_\_  
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 Now  1-3 Months  3-6 Months   
**How did you hear of us?**  
 Friend  Driving by  Newspaper   
 Signs  Radio  Other

# Quantum Home Tour™ Survey



**Name** \_\_\_\_\_  
**Phone** (     ) \_\_\_\_\_

I Individual Demographic	Yes	No
--------------------------	-----	----

- |  |  |
|--|--|
| <ol style="list-style-type: none"> <li>1. Are you familiar with the area? <input type="checkbox"/></li> <li>2. Do you own a home now? <input type="checkbox"/></li> <li>3. How long have you been looking? <input type="checkbox"/> 30 <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+</li> <li>4. Have you been looking in this area? <input type="checkbox"/></li> <li>5. Have you seen a lot of properties? <input type="checkbox"/></li> <li>6. Have you ever purchased property before? <input type="checkbox"/></li> </ol> | <input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/> |
|--|--|

Special Property Questions:

	Yes	No
--	-----	----

- |   |  |
|---|--|
| <ol style="list-style-type: none"> <li>1. Do you work in the area? <input type="checkbox"/></li> <li>2. What kind of work do you do? <input type="checkbox"/></li> <li>3. How many people in your family? <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5+</li> <li>4. What do you like about homes you have seen _____</li> <li>5. In what price range are you looking? <input type="checkbox"/> <input type="checkbox"/></li> <li>6. Have you been pre-qualified by a lender? <input type="checkbox"/> <input type="checkbox"/></li> <li>7. How soon are you moving? <input type="checkbox"/> 30 <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+</li> </ol> | <input type="checkbox"/> <input type="checkbox"/><br>Type: _____<br><input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5+<br>_____<br><input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> <input type="checkbox"/><br><input type="checkbox"/> 30 <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+ |
|---|--|

1. How soon can we meet together again? \_\_\_\_\_
2. When would be a good time to meet? \_\_\_\_\_
3. Which time would be best for you? \_\_\_\_\_ or \_\_\_\_\_?
4. Let's meet together on \_\_\_\_\_ or \_\_\_\_\_ at \_\_\_\_\_ or \_\_\_\_\_.

Our appointment is scheduled for \_\_\_\_\_ at \_\_\_\_\_.

I will call you the day before to confirm our appointment. When will be a good time to call? At what phone number? \_\_\_\_\_

Confirmation required

Reestablish relationship.

I will be calling to button down our appointment for \_\_\_\_\_ at \_\_\_\_\_. You can count on me to be there, can I count on you? "Yes." Great! I look forward to seeing you \_\_\_\_\_ at \_\_\_\_\_.

JTM Scripts  
For Memorization

# The Journey To Mastery™ Scripts



## Quantum Home Tour™ Procedure

### Example

### Role Play

### Invitation Script

Knock, knock/Phone script.

Hello, my name is \_\_\_\_\_ and I work with  
\_\_\_\_\_. I don't want to bother you right now if  
you're busy, but when would you have a few minutes to talk?

(Get "Yes" - Establish permission)

Our company is holding an Quantum Home Tour™ in your  
neighborhood and we have been getting a lot of interest in it.  
We want to invite you and your family to come and see the  
home and tell your friends about it.

Are you free today between noon and six?

Good! How would you feel about stopping by and helping  
your neighbors sell their home? When you see the house it  
may remind you of someone you know who would like to live  
in your neighborhood. The sellers would appreciate any  
friendly referrals you could offer that would help them. Can  
you drop by?

Where is it located?

(Give address)

Will you be there today?

(Get yes)

Fine, I'll definitely be there and I look forward to seeing you.  
Thank you. What is your name? Excellent - we'll see you  
later

Oh, by the way, feel free to bring any friends.

## Sign-in Script: Quantum Home Tour™

### Introduction

*Make sure prospect makes connection and relates to you.*

At the seller's Request, and as a condition for seeing the property...all guests are ask to sign the Guest Register and complete the information sheet before viewing their home.

### Sign-In

*Make sure you have information before you go on.*

*(Touch the sign in sheet twice and check to make sure it is accurate.)*

## Pre-Survey Script Quantum Home Tour™

## Pre-Survey Script: Quantum Home Tour™

### Introduction

*Make sure prospect makes connection and relates to you.*

(Name), We are conducting a survey on behalf of the seller that will assist our seller in understanding how their property is positioned in the market place.

### Permission

*Make sure you have permission before you go on.*

I have a few questions I'd like to ask you, and I can ask them now, would that be OK?

## Home Tour™ Follow-Up Script

### Introduction

*Make sure prospect  
makes connection  
and recognizes you.*

Hello (name), this is (your name) with (company).

We met earlier today at the Quantum Home Tour™ on (address).

### Permission

*Use experience of  
meeting to spring board  
conversation.*

Are you free to talk on the phone for a couple of minutes?

If yes, continue.

If no, ask when you can call back.

Okay, good. I didn't get a chance to spend much time with you today at the Quantum Home Tour™ and I wanted to follow up and touch base with you.

(Answer questions)

### Draw Out

Tell me a little bit about your situation.

How long have you been looking?

What time frame are you looking at?

What area do you want?

### Body

You know, we have hundreds of homes on the market right now and here's what I've found that works. I don't work with every potential client. I spend time with you to determine exactly what your needs are and then I go to work to find the property. You probably won't see a lot of property with me but the properties I show you will be meaningful.

## Home Tour™ Follow-Up Script

### Ask For Appointment

*Make sure all decision makers are present.*

When would be a good time?

How about...?

Which time...?

What time...?

Tell me who are the people involved in the decision making process?

Will you be sure to have them with you at our meeting? I will take personal responsibility to ensure the hour we spend together will be of value.

### Clarify Once Again

Time, date, place, and travel information.

Confirm names of all people expected.

## 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 an 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.

## Inbound Ad/Sign Call Phone Script

### Introduction

*Highlight information of property BRIEFLY to move caller off of property and to prime them for relationship.*

*Keep control of conversation - keep brief - move conversation off of property into experience.*

Hello, (company), how may I help you?

I'm calling about the house I saw advertised in (newspaper).

Just a minute, let me get that ad in front of me so that I can be certain I give you accurate information.

What's your name?

Okay, (name). I've got that ad in front of me, what do you need to know?

(Give concise information about the property that is available, i.e. whether or not it has been sold, reduced, etc. Keep information to 2-3 key points.)

### Draw Out

*Get caller talking about their experience of looking for property.*

*Get caller to ENGAGE with you in relationship.*

What was there about this ad that caught your eye?

How long have you been looking for a home?

What kinds of things are you looking for?

Oh yes, which, go on, of for heavens sake, really, wow (give lots of positive reinforcers).

### Conversion

*You must be convinced that this is the best way to work and hold the line, without compromise.*

You know, (name), it sounds to me like you need someone to represent you. We have hundreds of homes listed and most of the property sells in days, before we can advertise it. So a lot of the time, what you see being advertised is property that is hard to move.