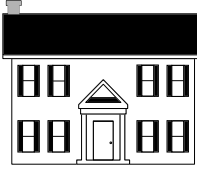


# **The Journey To Mastery™ Forms**

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# Quantum Home Tour™ Sign Permission Roster

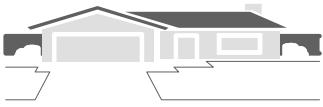


I agree to give permission to \_\_\_\_\_ of \_\_\_\_\_ Realty, to  
 place a directional Home Tour™ sign on my property listed below on Saturday and Sunday,  
 \_\_\_\_\_ 199\_\_ and \_\_\_\_\_ 199\_\_ for an Open House being held at:  
 \_\_\_\_\_. Thank You For Helping Your Neighbor.

Date	Name	Address	Y/N	Initials	Comments



# 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

**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

**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

**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

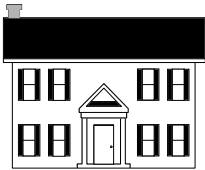
**Do you:** Own  Rent

**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



# Quantum Home Tour™ Survey



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

**I Individual Demographic** Yes                  No

- |    |  |                             |  |
|----|--|-----------------------------|--|
|    |  |                             | Special Property Questions:<br><div style="border: 1px solid black; height: 60px; width: 100%;"></div> |
| 1. | Are you familiar with the area?          | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 2. | Do you own a home now?                   | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 3. | How long have you been looking?          | <input type="checkbox"/> 30 | <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+                  |
| 4. | Have you been looking in this area?      | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 5. | Have you seen a lot of properties?       | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 6. | Have you ever purchased property before? | <input type="checkbox"/>    | <input type="checkbox"/>   |

Yes                  No

- |    |  |                             |  |
|----|--|-----------------------------|--|
|    |  |                             |  |
| 1. | Do you work in the area?                   | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 2. | What kind of work do you do?               | Type: _____                 |  |
| 3. | How many people in your family?            | <input type="checkbox"/> 2  | <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5+    |
| 4. | What do you like about homes you have seen | _____                       |  |
| 5. | In what price range are you looking?       | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 6. | Have you been pre-qualified by a lender?   | <input type="checkbox"/>    | <input type="checkbox"/>   |
| 7. | How soon are you moving?                   | <input type="checkbox"/> 30 | <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 20+ |

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 \_\_\_\_\_.



# 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 \_\_\_\_\_

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date							
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			



**QUANTUM  
MANAGEMENT  
SYSTEMS**

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WKLYSCHD QHT.p65

# 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: \_\_\_\_\_



# Committed Buyer Checklist

For _____	Company _____
Client _____	Date acquired _____
Date called _____	Appointment Date: _____
Open house _____	Address _____
Work phone (    ) _____	Home phone (    ) _____

**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**

**WE HAVE AGREED:**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| YES                      | NO                       |   |
| <input type="checkbox"/> | <input type="checkbox"/> | 1. To have all decision makers present in person.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. To spend at least 45 minutes in interview.   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. To come to an agreement on what you're looking for.<br>(1) _____<br>(2) _____<br>(3) _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. That I am your exclusive agent and I represent you.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. (Buyers agreement attached)  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. That you will be pre-qualified by _____<br>for \$_____ down payment.                       |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. That you are prepared to buy now.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Date/time of next appointment.   |
| _____                    |                          |   |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. That we will be in communication.  |
| <input type="checkbox"/> | <input type="checkbox"/> | 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.



# Exclusive Client Relationship 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 Analysis


**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.