

# Conditional License Agreement

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## Conditional License

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You shall agree to use the trained materials, manuals and attached materials for exclusive use in your own business, and if you terminate your affiliation with the site licensee this license will be terminated automatically and without notice. You shall further agree to not disclose the program to anyone other than parties to this agreement. In addition, you agree that any such use must conform to the provisions set forth in the attached manuals and associated materials.

## Assignment

You may not transfer the manual or accompanying materials.

## Term

The license is effective until terminated. Quantum and or Douglas M. Yeaman have the right to terminate your license immediately if you fail to comply with any terms of this Agreement. Upon any such termination you will destroy the original and any copies and related materials and cease all use of the trademarks and cease to conduct this program in any way.

## Entire Agreement

You acknowledge that you have read this agreement, understand it and that it is the complete and exclusive statement of your agreement with Douglas M. Yeaman and Quantum which supersedes any prior agreement, oral or written, and any other communications between Quantum its trainers, sales agents or affiliated others, and you relating to the subject matter of this agreement, and that your obligations under this agreement shall inure to the benefit of Douglas M. Yeaman and Quantum's licensees whose rights are licensed under this agreement. No variation of the terms of this agreement will be enforceable against Quantum unless Quantum gives its express consent in writing signed by an officer of Quantum and or Douglas M. Yeaman.

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

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

\_\_\_\_\_  
Signed                                      Date

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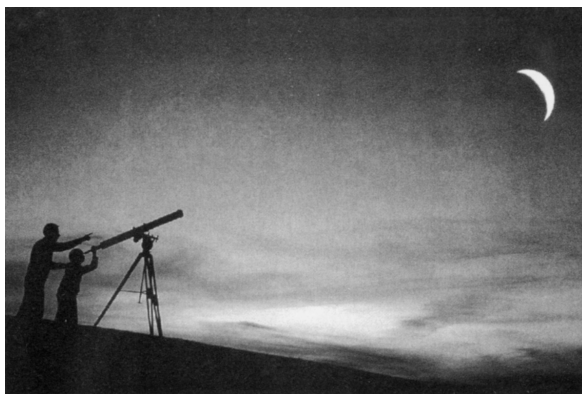
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\_\_\_\_\_  
Printed Name

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

\_\_\_\_\_  
Signed                      Date



# A new vision for the real estate profession: People first.

( No, really. People first. )

## **We are about people.**

We are about energy, about passion. We are about creating an environment where people can be nourished and feel fulfilled. (And let's not forget, make money. Lots of money.)

But you know, being happy means more than making lots of money. It means getting home for dinner. Taking a vacation. Leading a balanced life. This is Prudential Preferred Properties.

## **We started from scratch.**

Prudential Preferred Properties started with a new president, a president with a vision. Someone who believes in achieving greatness by focusing on the human spirit. Someone who believes that financial success comes from following your passion.

Our president's core values give people the freedom to be their best. Values that first and foremost put people at the top.

He believes the organization should be driven from the bottom up. Not dictated from the top down. Leadership that doesn't push people aside, but inspires them to step out in front.

He is passionate about commitment. A commitment that can embrace failure and use it to grow.

He believes in the power of telling the truth. A power that demands people be accountable for their lives, their actions, and for their commitment to their clients.

## **Not just real estate. A way of life.**

We are recruiting people who are hungry to work for a company that believes in them. Where having a life and a successful career are not diametrically opposed.

We are recruiting people who are excited to get out of bed in the morning and who want to do something great. Who are not afraid of putting in a hard day's work. People who really love their careers. People with zero tolerance for mediocrity.

If you want to know why we are the best real estate company in Chicagoland, ask the man who is making it that way: Douglas M. Yeaman, President, Prudential Preferred Properties at 312-335-3838.



EQUAL OPPORTUNITY  
EMPLOYER

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**Prudential**  
**Preferred Properties**

# Agent Recruitment Meeting Schedule - Mgr



1. Meet and Greet - See if you like them - and if there are shared values- get into relationship. Get permission to have next meetings.
2. 2nd Meeting-meet for coffee, probe (form provided). Offer to help them analyze business and develop a plan - agreement to meet again
3. Formal Meeting - Go over beginning business analysis with agent (form provided). Get permission to verify sales and listings for past 12 months. Set next meeting.
4. Review and verify last 12 months production-verify source. Probe them and talk about how they use time (PIN) - do quick analysis on where clients are coming from. Show them how we can help increase production. Give them report (Chris McKeever's). Set next meeting. "I've enjoyed meeting with you. I would like to meet again and make you an offer to join Bailey Properties."
5. Formal offer to join Bailey Properties.

- **Don't sell - be agent consultant.**
- **Be curious - not judgmental.**
- **Get them to be open and honest.**
- **Use our system to show them that we think about the business differently.**
- "I can do an analysis of your business and help you prepare a plan."
- "Tell me, what did that effort look like"
- "I believe in helping agents be more productive."
- "Yes I would like to have you work with us-but that is not my purpose today."
- "This is not conditioned on you coming to work for Bailey Properties."
- "I believe I can help you."
- "I will guarantee you I can increase your business."
- "Let's not talk about splits - let's talk about how much more money your can make."
- "I'd like to share with you what it is we do to help our agents be more productive."

## Recruiting Call Dialogue

### Goal - Meet and Greet

Hi, this is \_\_\_\_\_ from Bailey Properties, how are you?

I don't want to bother you right now, when would you have two minutes to talk to me on the phone?

I am the manager of the \_\_\_\_\_ office and I am touching bases with all the agents in our market to see how you are doing and to find out what kind of changes you are seeing in the market place.

We are colleagues as well as competitors and as professionals it is important to stay in touch and keep each other posted of changes that are occurring in the market, as to allow us to stay ahead of them.

#### *(Make this relevant to your market.)*

- What are you seeing as happening in the market?
- I've noticed a slow down at broker tours, how about you?
- I just read some MLS stats that say there is a slow down on parts of \_\_\_\_\_, have you noticed anything in our market?
- Time on market appears to be getting longer/shorter, what have you noticed?
- Open house activity seems UP/DOWN, what have you noticed:
- What are your feelings about the market?
- What kind of changes have you been noticing in the MARKET/INDUSTRY/TOWN?
- We have noticed that calls to our Call Center have NOT dropped off at all, what have you noticed?

You K\_N\_O\_W, I really enjoyed talking to you, this has been great for me. I would really like to meet you. Since we are co-professionals in this business I'd like to meet you. When is a good time to get together?

I have some time (tomorrow, later in the week, next week), when is a good time?

I work off a tight schedule; let's get together at a time that works for you.

I am putting it into my calendar and writing it down. You can ABSOLUTELY count on me to be there, can I count on you?

[what time...which time...when...where...how soon]

- 1- get permission
- 2- get them to start talking
- 3- transition
- 4- appointment
- 5- confirmation

# Bailey Properties

## Evaluation and Analysis

For

---

(Name)

---

(Address)

---

(Office)

---

(Home Phone)

---

(Office Phone)

---

(Cell Phone)

---

(Fax Line)

---

(E-Mail Address)

---

(Birth Date)

**You understand that this meeting is to allow us to find ways to help understand one another and to help build business. I believe in building relationships and in my \_\_\_\_\_ years in the real estate business I have gotten a lot of satisfaction out of helping agents reach the next level in their business and it doesn't matter whether they are working for me or not. In our business we are colleagues as well as competitors, so what I can do to help you will come back to my office and me in good relationships in the future. What we talk about is strictly confidential and is strictly between you and I. So in order for us to determine whether or not we can build a relationship, I need to ask you a few questions. Some may feel personal or even make you a little uncomfortable. Is that going to be OK?**

- 1. TELL ME WHAT YOU'VE BEEN DOING TO GENERATE BUSINESS? What? When? Where? Why? How? Anything else?**
- 2. TELL ME HOW LONG HAVE YOU BEEN IN THE REAL ESTATE BUSINESS? With whom? How long? With anyone else?**
- 3. GIVE ME A SENSE OF HOW YOUR BUSINESS IS BROKEN DOWN IN THE LAST 12 MONTHS. Number of buyers versus number of sellers? Your average sales price?**

**4. WHERE DOES YOUR BUSINESS COME FROM? (i.e. floor calls, referrals etc.)**

**5. TELL ME WHAT YOUR IDEAL REAL ESTATE OFFICE WOULD LOOK LIKE? What does that mean to you? Tell me more about that? What else?**

**6. TELL ME WHAT YOUR RELATIONSHIP WITH YOUR MANAGER IS LIKE? What does your company or manager mean to you?**



**7. TELL ME WHY YOU LIKE THE \_\_\_\_\_ REAL ESTATE OFFICE? What are the main things you like about it?**

**8. TELL ME ABOUT YOUR BUSINESS PLAN? Do you follow it? Do you keep it up to date? How often do you review it?**

**9. TELL ME ABOUT YOUR MARKETING PLAN? How does it help you generate business? How much business does it help you generate? Anything else?**

**10. TELL ME, IS THERE ANYTHING YOU ARE CURRENTLY CONCERNED ABOUT?**

**11. TELL ME THE ONE THING YOU WOULD LIKE TO ADD TO THE WAY YOU DO YOUR BUSINESS?**

**12. TELL ME ABOUT WHAT YOU SPEND ON PERSONAL MARKETING? How do you track the results? How much do you spend? What percentage of your income is that?**

**13. TELL ME HOW YOU FEEL ABOUT COMPANY SPONSORED TRAINING?**

**14. GIVE ME A SENSE OF WHAT YOU THINK TODAY'S SALES ASSOCIATE WANTS FROM THEIR COMPANY?**

**15. WHAT DO YOU THINK FUTURE AGENTS WILL WANT IN THE FORM OF AGENT SUPPORT OR SERVICES FROM THEIR COMPANY?**

**This has been a very informative meeting for me. To get us to the next step, I would like to meet with you again to discuss your business and analyze it with you. In order to do this there are a few simple questions you will need to think about and bring back the answers to our next meeting.**

**Can we go over them briefly and then set up our next get together?**

## Beginning Business Analysis for

---

1. Where would you like your business to be one year from now?

Three years from now?

Five years from now?

2. List everything you think you will need to get there.

3. If you accomplish your goals, what would it mean to you and your family?

4. What one thing, from the list of what you need is really critical to help you accomplish your goals?

5. With your permission, I am going to go into REIL.com and look at your production numbers from for the last 12 months in order to assist you to analyze your business when we get together next time.

**THIS SURVEY IS HELD STRICTY CONFIDENTIAL BY \_\_\_\_\_  
OF BAILEY PROPERTIES AND WILL NOT BE USED FOR BUSINESS ADVANTAGE  
NOR REVEALED TO ANY OTHER PERSON WITHOUT THE CONSENT OF THE PER-  
SON WHOSE NAME APPEARS AT THE TOP OF THIS SURVEY.**

\_\_\_\_\_  
DATE \_\_\_\_\_

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List Date  List Price  Max

List Agt Last Name  Sell Agt Last Name

List Broker Code  Sell Broker Code

**Hot Sheet**  
 click to select multiple  
   within last  Minutes

[Clear](#) > [Advanced Search](#) [Preview Count](#) [Search](#)

**Tips**

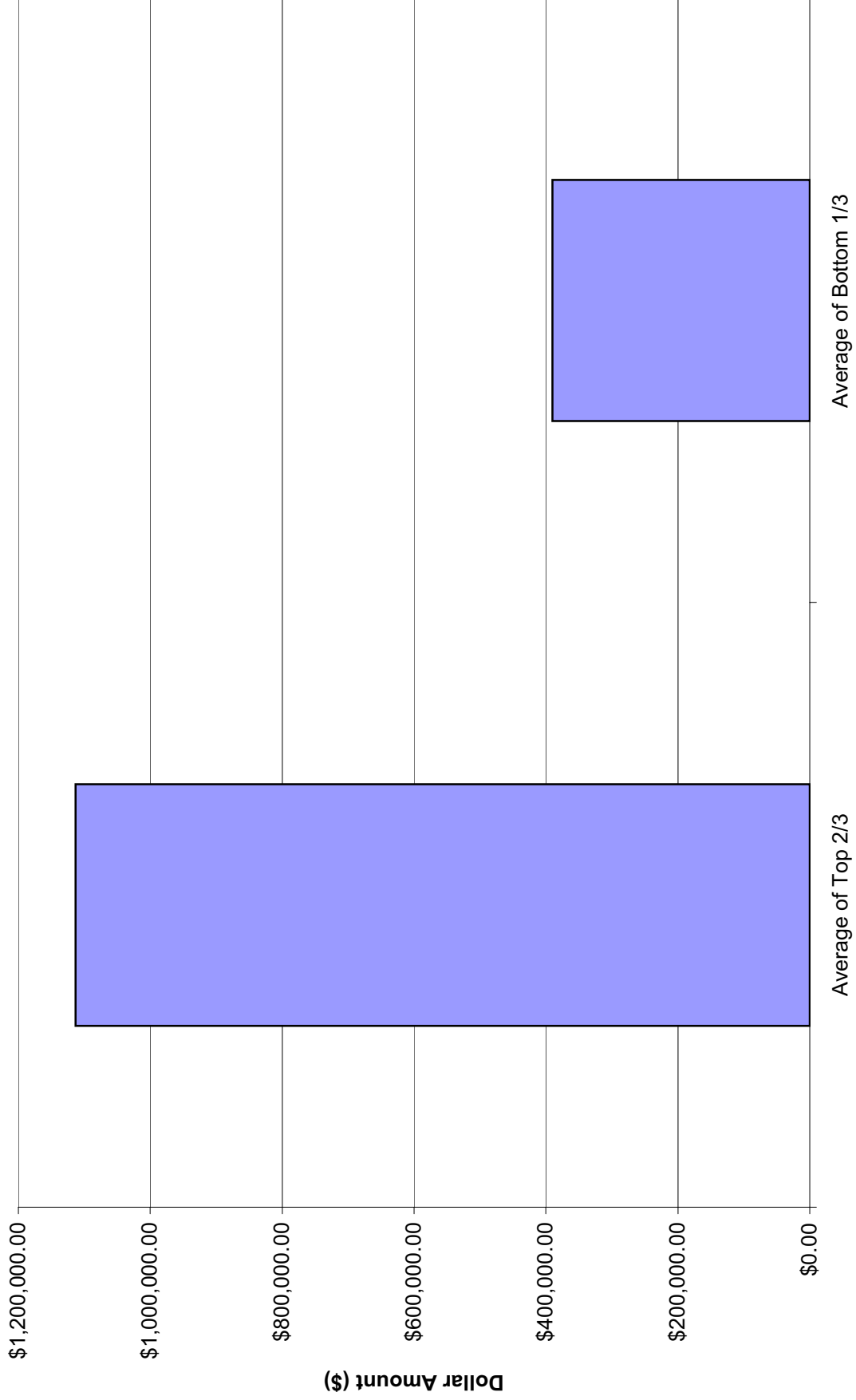
- You can sort by multiple columns in search results. Click the column heading you want to use for the primary sorting, click the next column heading you want to use for the secondary sorting, continue to click column headings until you have finished selecting columns you want to include in the sorting. For more details, please refer to the User Guide pdf file (pages 2-19 to 2-20) posted on Product Info Center.

< Done www.reil.com

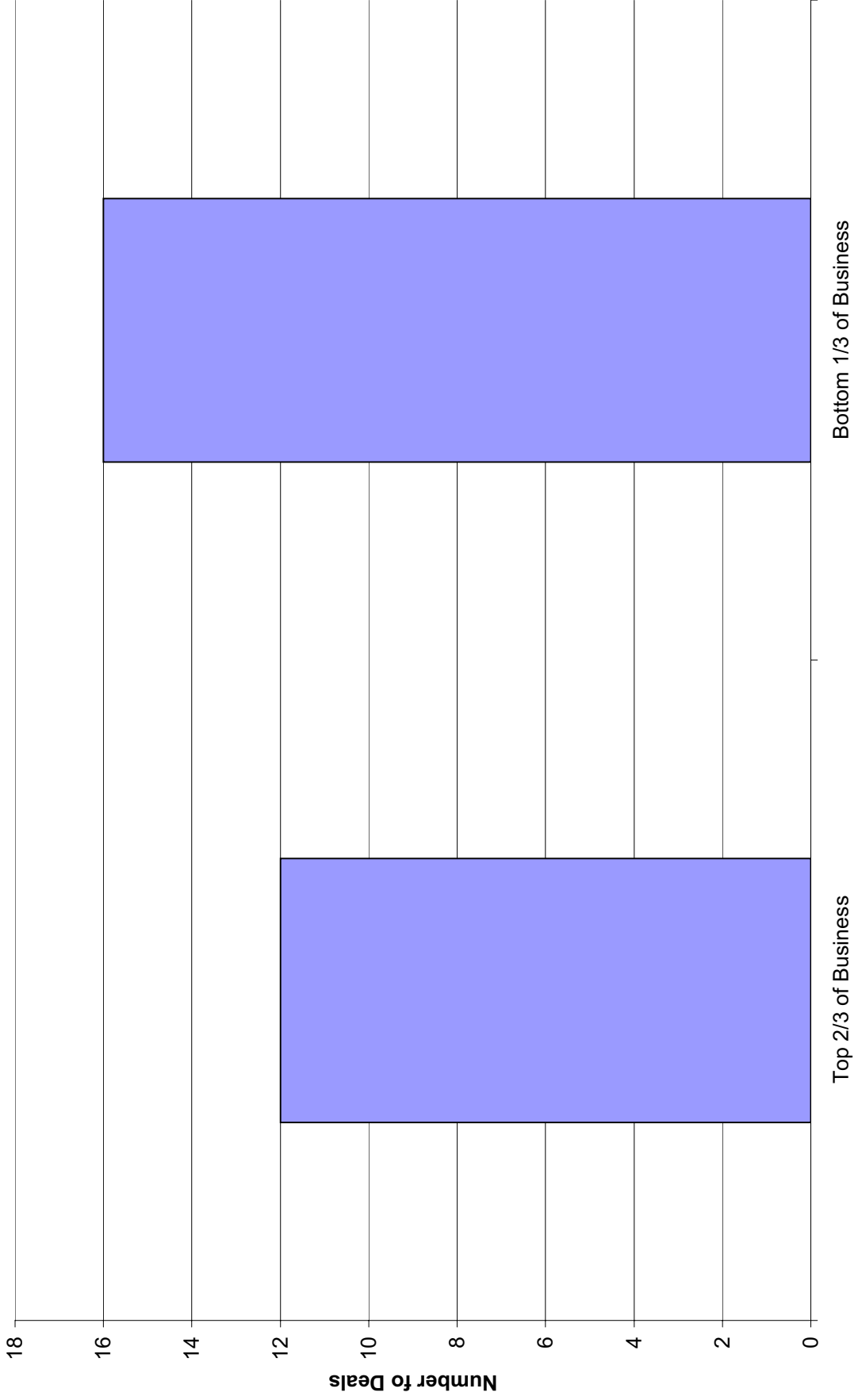
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	Transaction Price	Average Transaction Price	Median Transaction Price	Deals Comprising Top 2/3 of Transactions	Average Transaction Price for Top 2/3
Transactions - 2002	\$19,600,750.00	\$700,026.79	\$482,000.00	12	\$1,113,104.17
Transactions - 2003	\$4,662,000.00	\$582,750.00	\$585,000.00	5	\$668,600.00

### Transactions - 2002 Percentile Average Transactions

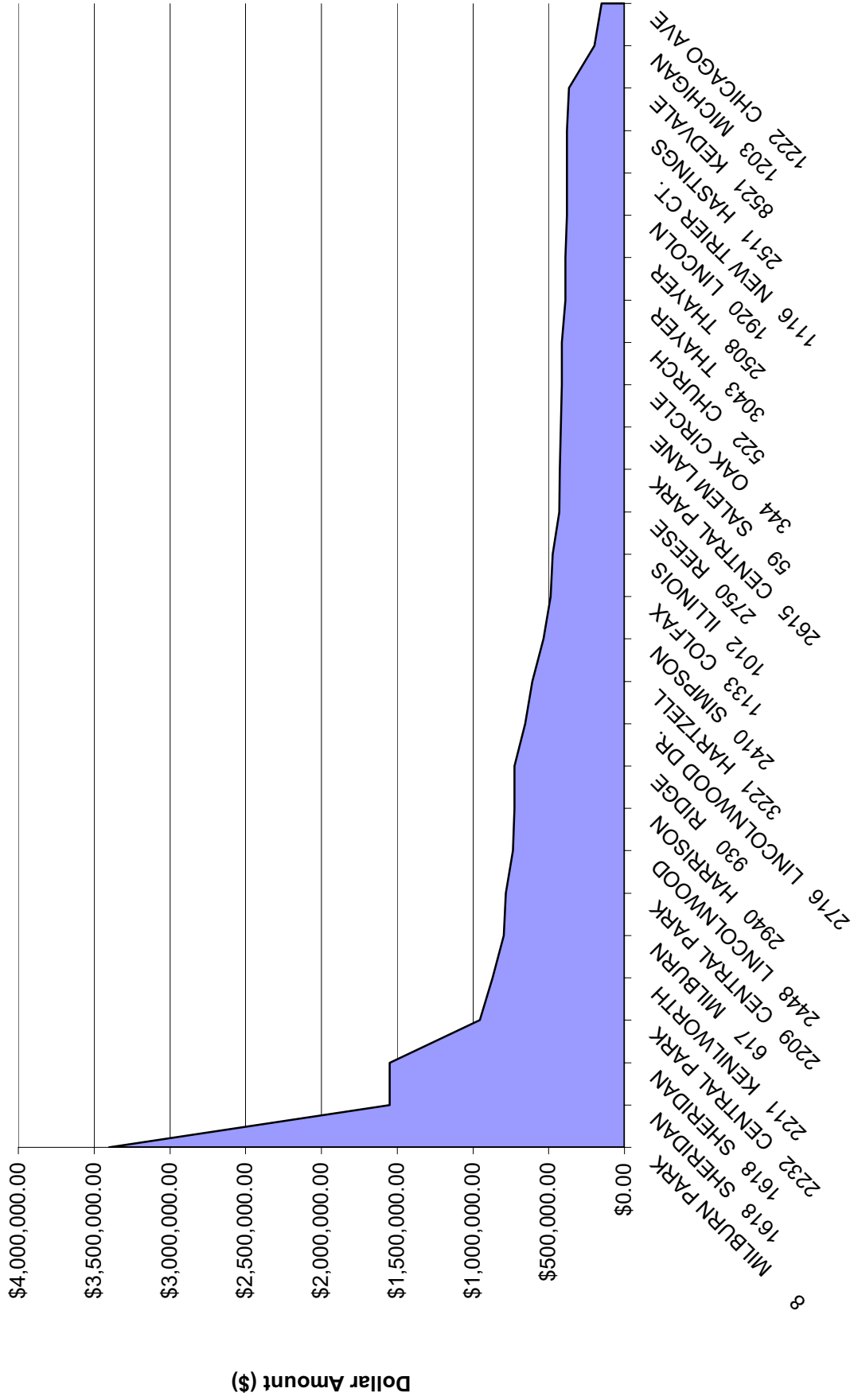


### Transactions - 2002 Percentile Deals



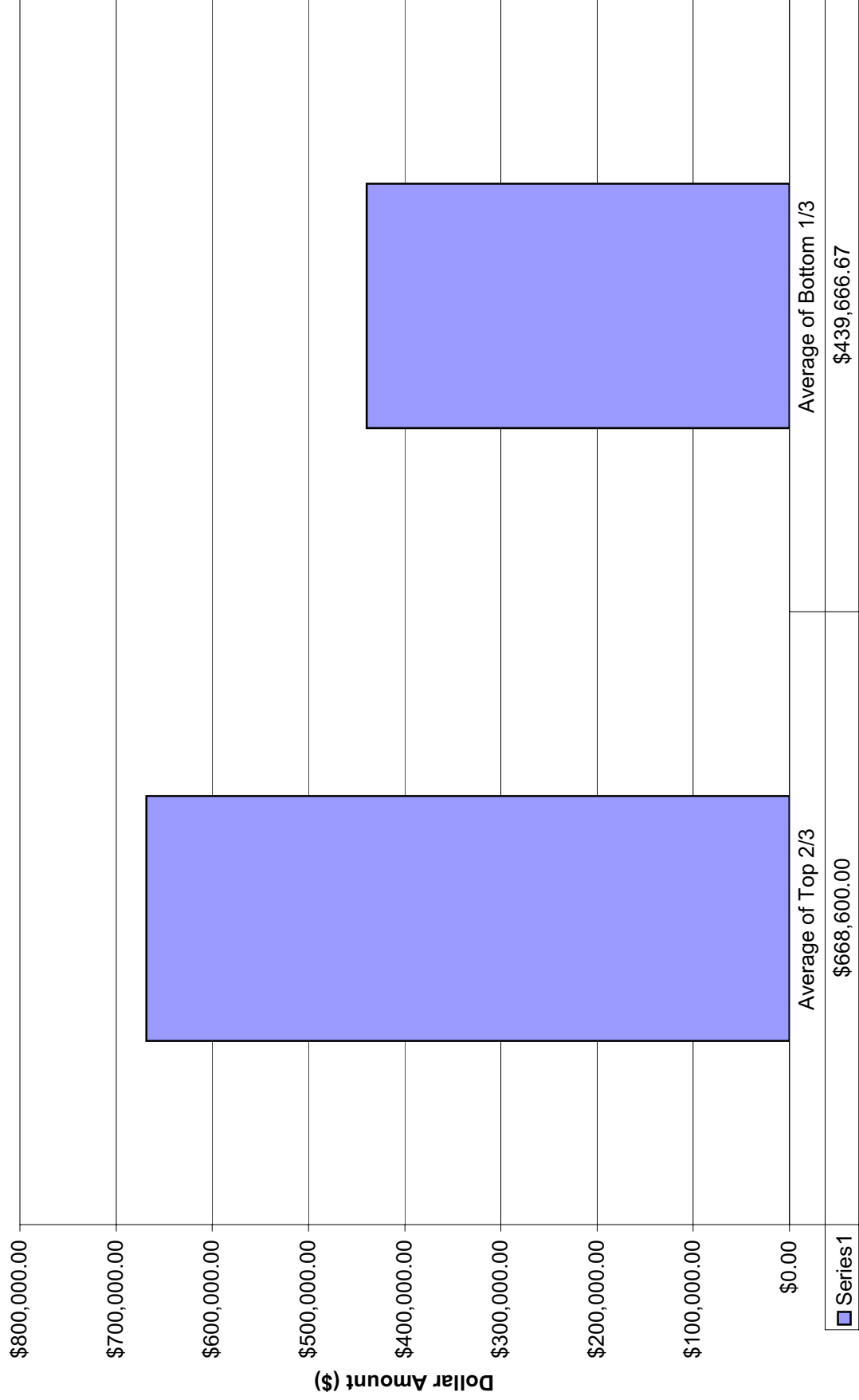


### Transactions - 2002 Transaction Amounts

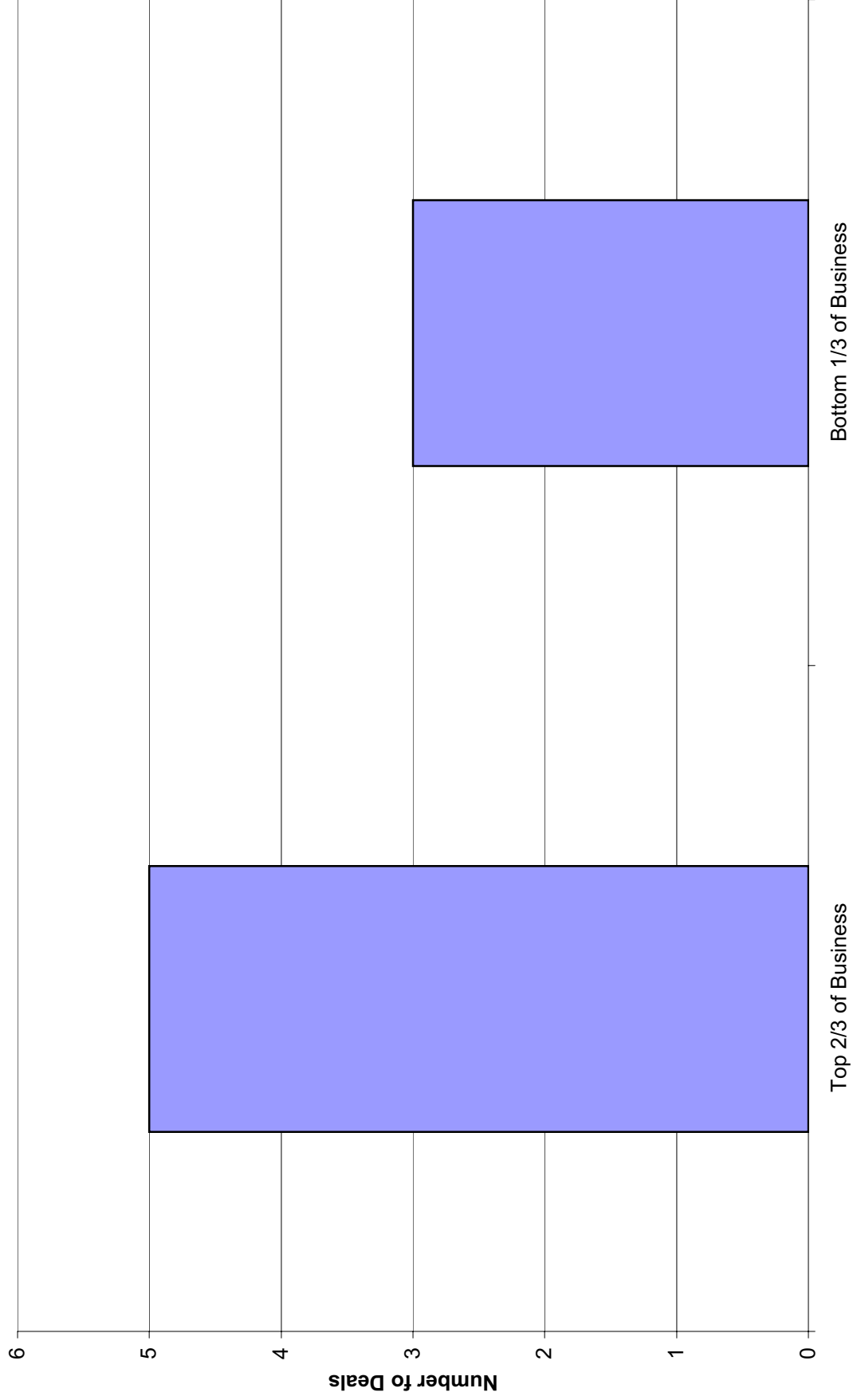


Closed Date	Address	City	Listing Price	Sale Price	Status	Market Time	Agent Na	Agent ID	Sale Percentage (%)	Referral Source
8/2/2002	8 MILBURN PARK	EVANSTON	\$3,500,000.00	\$3,400,000.00	CLSD	1			17.35	Referral
9/27/2002	1618 SHERIDAN	WILMETTE	\$1,825,000.00	\$1,550,000.00	CLSD	169			7.91	Sphere
9/27/2002	1618 SHERIDAN	WILMETTE	\$1,825,000.00	\$1,550,000.00	CLSD	169			7.91	Sphere
11/25/2002	2232 CENTRAL PARK	EVANSTON	\$1,050,000.00	\$955,000.00	CLSD	223			4.87	Sphere
8/23/2002	2211 KENILWORTH	WILMETTE	\$895,000.00	\$870,000.00	CLSD	36			4.44	Sphere
10/28/2002	617 MILBURN	EVANSTON	\$835,000.00	\$795,000.00	CLSD	70			4.06	Referral
6/10/2002	2209 CENTRAL PARK	EVANSTON	\$799,500.00	\$783,750.00	CLSD	52			4.00	Referral
7/30/2002	2448 LINCOLNWOOD	EVANSTON	\$765,000.00	\$737,500.00	CLSD	32			3.76	Sphere
9/16/2002	2940 HARRISON	EVANSTON	\$739,000.00	\$725,000.00	CLSD	121			3.70	Referral
12/6/2002	930 RIDGE	EVANSTON	\$755,000.00	\$725,000.00	CLSD	76			3.70	Sphere
12/5/2002	2716 LINCOLNWOOD DR.	EVANSTON	\$665,000.00	\$656,000.00	CLSD	76			3.35	Sphere
7/8/2002	3221 HARTZELL	EVANSTON	\$629,000.00	\$610,000.00	CLSD	41			3.11	Sphere
10/23/2002	2410 SIMPSON	EVANSTON	\$569,000.00	\$536,000.00	CLSD	118			2.73	Sign Call
10/11/2002	1133 COLFAX	EVANSTON	\$509,000.00	\$489,000.00	CLSD	104			2.49	Sign Call
8/30/2002	1012 ILLINOIS	WILMETTE	\$479,000.00	\$475,000.00	CLSD	40			2.42	Sign Call
10/29/2002	2750 REESE	EVANSTON	\$449,000.00	\$430,000.00	CLSD	118			2.19	Personal Advertising
10/31/2002	59 SALEM LANE	EVANSTON	\$445,000.00	\$427,500.00	CLSD	50			2.18	Personal Advertising
9/17/2002	2615 CENTRAL PARK	EVANSTON	\$424,900.00	\$420,000.00	CLSD	64			2.14	Personal Advertising
5/30/2002	344 OAK CIRCLE	WILMETTE	\$435,000.00	\$415,000.00	CLSD	36			2.12	Personal Advertising
7/30/2002	522 CHURCH	EVANSTON	\$450,000.00	\$415,000.00	CLSD	145			2.12	Personal Advertising
8/23/2002	3043 THAYER	EVANSTON	\$389,000.00	\$389,000.00	CLSD	38			1.98	Sphere
9/9/2002	2508 THAYER	EVANSTON	\$359,000.00	\$389,000.00	CLSD	1			1.98	Sphere
8/29/2002	1920 LINCOLN	EVANSTON	\$385,000.00	\$381,000.00	CLSD	89			1.94	Sphere
9/26/2002	1116 NEW TRIER CT.	WILMETTE	\$389,000.00	\$381,000.00	CLSD	33			1.94	Sphere
8/23/2002	2511 HASTINGS	EVANSTON	\$395,000.00	\$380,000.00	CLSD	99			1.94	Sphere
11/25/2002	8521 KEDVALE	SKOKIE	\$374,500.00	\$366,000.00	CLSD	48			1.87	Sphere
7/1/2002	1203 MICHIGAN	EVANSTON	\$199,000.00	\$199,000.00	CLSD	38			1.02	Referral
6/19/2002	1222 CHICAGO AVE	EVANSTON	\$157,000.00	\$151,000.00	CLSD	46			0.77	Referral
			Total Transaction	\$19,600,750.00						
			Average Transaction	\$700,026.79						
			Median Price	\$482,000.00						
			Top 2/3 of Business	12						
			Average of Top 2/3	\$1,113,104.17						
			Bottom 1/3 of Business	16						
			Average of Bottom 1/3	\$390,218.75						

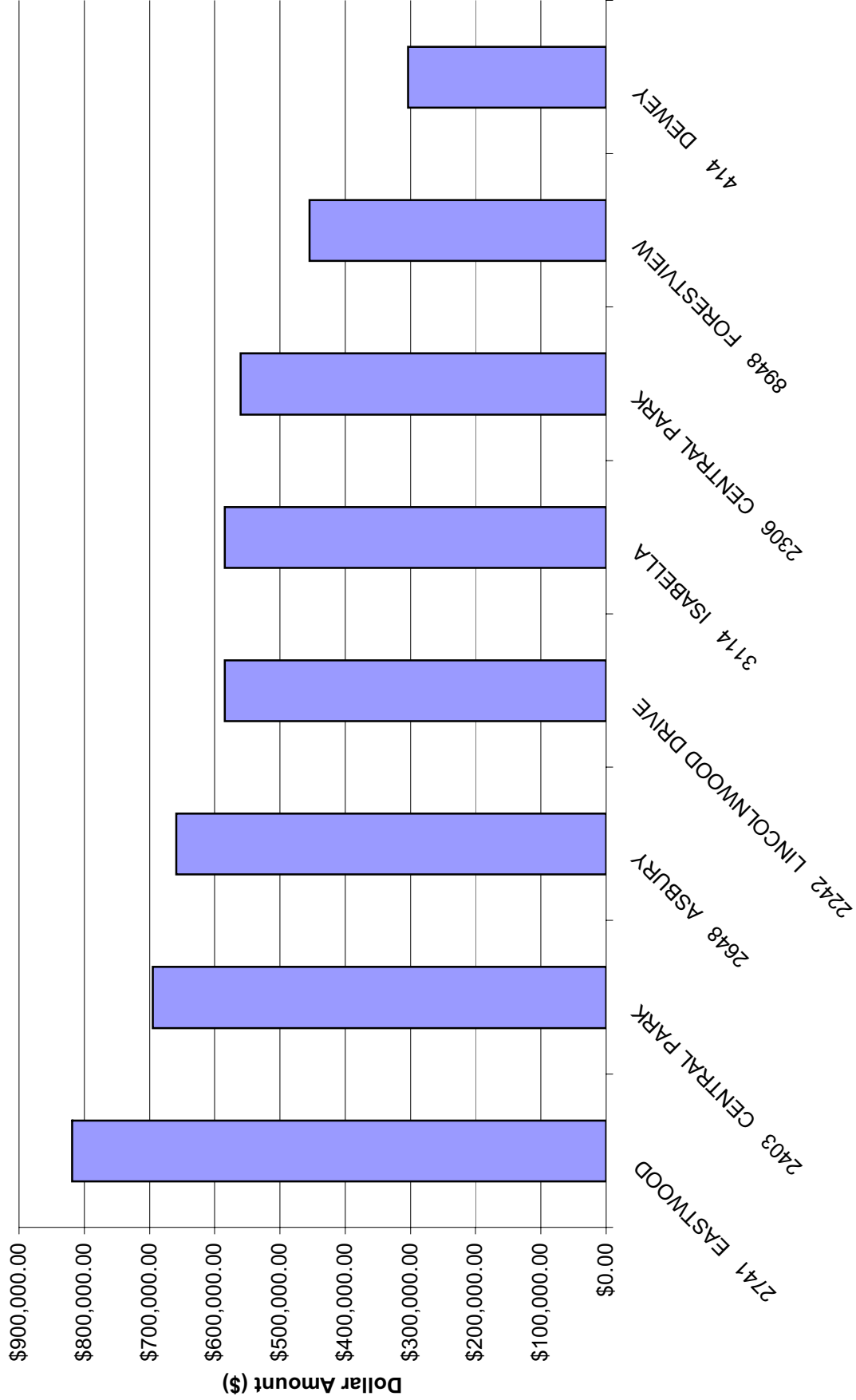
### Transactions - 2003 Percentile Average Transactions



# Transactions - 2003 Percentile Deals



**Transactions - 2003 Transaction Amounts**



CLAIRE SUCSY  
Transactions - 2003

Closed Date	Address	City	Listing Price	Sale Price	Status	Market Time	Agent Name	Agent ID	Sale Percentage (%)	Referral Source
1/30/2003	2741 EASTWOOD	EVANSTON	\$859,000.00	\$819,000.00	CLSD	54			17.57	Sphere
4/25/2003	2403 CENTRAL PARK	EVANSTON	\$709,000.00	\$695,000.00	CLSD	52			14.91	Sphere
3/25/2003	2648 ASBURY	EVANSTON	\$669,000.00	\$659,000.00	CLSD	72			14.14	Sphere
3/28/2003	2242 LINCOLNWOOD DRIVE	EVANSTON	\$615,000.00	\$585,000.00	CLSD	109			12.55	Sphere
4/28/2003	3114 ISABELLA	EVANSTON	\$614,000.00	\$585,000.00	CLSD	71			12.55	Personal Ad
3/7/2003	2306 CENTRAL PARK	EVANSTON	\$589,000.00	\$560,000.00	CLSD	203			12.01	Sphere
3/14/2003	8948 FORESTVIEW	EVANSTON	\$479,000.00	\$455,000.00	CLSD	198			9.76	Referral
3/14/2003	414 DEWEY	EVANSTON	\$329,000.00	\$304,000.00	CLSD	127			6.52	Referral
			Total Transaction	<b>\$4,662,000.00</b>						
			Average Transaction	<b>\$582,750.00</b>						
			Median Price	<b>\$585,000.00</b>						
			Top 2/3 of Business	<b>5</b>						
			Average of Top 2/3	<b>\$668,600.00</b>						
			Bottom 1/3 of Business	<b>3</b>						
			Average of Bottom 1/3	<b>\$439,666.67</b>						

# A ROCK SOLID GUARANTEE: PEOPLE FIRST

November 15, 2001

**PREPARED ESPECIALLY FOR:** **Sharon Smith**

**PREPARED BY:** **Dawn McAnaney, Broker-Manager**  
**Prudential Preferred Properties**

**PRESIDENT:** **Doug Yeaman, C.E.O. & President**  
**Prudential Preferred Properties**



*Prudential Preferred Properties wishes to thank talented students,  
**Brett Kahren and Kellar Williams**, of New Trier High School  
for the architectural drawings that enhance this presentation.*

## BUSINESS DEVELOPMENT PLAN

# SIMPLY DEFINED RARELY ACHIEVED

## **Prudential Preferred Properties**

(pru-den´chul pre´ferd prop´er-tees.), noun.

It's a new idea in real estate.

**People First.**

It's a fresh approach to real estate competence.

**Zero tolerance for mediocrity.**

It's a focus on relationships.

**Our culture is committed to total honesty and integrity.**

It is not for everyone.

**We are highly selective — interested in quality, never quantity.**

It's a commitment to ongoing excellence.

**That is our promise to you.**

## **Prudential Preferred Properties' Agents**

(pru-den´chul pre´ferd prop´er-tees a´gents), noun.

**Respected.**

**Remarkably competent.**

**Empowered.**

You have been singled out for your professional integrity, your caring personality and your obvious ability to build lasting relationships. We invite you to join us.



# ONE ON ONE COACHING AND CAREER PLANNING

Prudential Preferred Properties is recognized in the Chicagoland real estate market as an innovator—providing a fresh approach to doing business with our agents and clients alike.

The President of Prudential Preferred Properties, Douglas M. Yeaman, leads our team. Doug is a nationally renowned management consultant and an inspirational and charismatic leader. He is known for his remarkable ability to motivate and train people within an organization; enabling them to achieve peak performance. He is the founder of Quantum Management and was approached by Prudential Realty to introduce to the Chicagoland area a radically different real estate culture. It was and is a culture that inspires people to grow and lead balanced lives. It is a culture that puts the people associated and affiliated with this company first - above all other considerations. It is a simple and straightforward approach, yet is unprecedented among the giant real estate companies in Chicagoland. It is an empowering concept for our members and is the secret to our overwhelming success.

Your manager and private coach has been highly trained to prepare you for incomparable success—leading you to the next level in your career with fresh, finely tuned skills and leadership advantages including:

- Constant communication
- A clear understanding of your business
- Personal attention to your specific needs and requirements for success
- Career planning and personal coaching
- Masters, Transaction and Action group programs
- The Journey to Mastery™ experience
- Cutting edge marketing programs
- Providing an environment where you are only doing the most productive activities - someone else is responsible for the details and the paper work

**Our focus is always on you.**

Our culture is all about you—as a whole person, not just as a real estate agent. We are interested in assisting you in achieving your business goals faster, with less effort and greater efficiency so that you have plenty of energy left for the rest of your life.

# ONE ON ONE COACHING AND CAREER PLANNING

## **Agent Services—“Your Personal Assistant”**

Our goal is to provide an environment in which our agents are busy working with clients, not busy doing administrative tasks.

You will enjoy the timesaving convenience of our Agent Services Center, a central point of contact where any agent, regardless of company can make an appointment to show any of your listings. We're making it easy to show your properties and therefore, your properties get shown more often.

The center manages all the details of making listing appointments including contacting you, the listing agent and the seller to arrange and confirm showings. This service is open 9 hours a day, 364 days a year—a service that no other real estate company in Chicagoland provides.

The Agent Services Center also tracks your showings and provides you a detailed report so that you can review your showing activity, adjust your marketing strategies with confidence and keep your seller constantly informed.

Agent services will also input your listing for you into all of the Prudential systems and into the MLS.

## **The Client Call Center—A Mature Approach to Generating Showings**

Buyer inquiries about your listings that are prompted by our ads and signs are always handled by a professional specifically trained to answer inquiries and convert those calls to appointments for your properties. We believe that floor time is a waste of your time and those valuable buyer calls that everyone has worked so hard to generate should always be given exceptional attention.

Based on a national survey, in a typical real estate environment, less than 2% of all calls into an office result in an appointment. We are excited and pleased to report that the team responsible for generating showings on your listings capture more than 80%! These numbers are unheard of in the industry. This means more showings of your listings, more exposure for your properties and more activity to report to your Sellers.

The Call Center is staffed 9 hours a day, 7 days a week, 364 days a year by a real person, not voice mail. We constantly monitor the effectiveness of the Call Center and know that you and your Sellers will be pleased with the remarkable results.

# ONE ON ONE COACHING AND CAREER PLANNING

## **Quantum and Prestige Home Tours™— (It's anything but your average open house.)**

What if you simply secure the listing and another fussy professional arranges all of the details of one of the most exciting marketing strategies to ever hit the Chicagoland market?

What if you got on with other business and a highly skilled and experienced manager coordinated mailing an invitation to the event to 1,000 targeted qualified, prospective home buyers?

Then, what if this same skilled professional supervised a team of telemarketers to call everyone on the invitation list?

On the day of the event, what if a team of certified specialists took care of all the signage, set-up an elegant refreshment table for the guests, checked invitations or ID's at the door and accompanied each guest through the home personally—while you enjoyed a leisurely weekend at the beach?

And if that team of specialists placed a follow up call within 48 hours to all of the guests to gauge their interest and reported all of this back to you, wouldn't that be incredible?

This is not a dream. This is a Prestige Home Tour™, a patented system available only to Prudential Preferred Properties' clients. In the Chicagoland markets, Quantum and Prestige Home Tours™ have averaged between 60 and 200 visitors over the span of one weekend.

This single event is designed to maximize the exposure and impact of the property on the greatest pool of potential buyers. Like all aspects of our company, the Quantum and Prestige Home Tours™ are cutting edge thinking. Most importantly, these deliver results.

# ONE ON ONE COACHING AND CAREER PLANNING

## **Scientific, Target Marketing**

With the aid of sophisticated data mining tools, buyers for Prudential Preferred Properties' listings are pinpointed. Then we conduct an out-reach campaign of mailing and calling to see if a match can be made between the buyer and the property.

Your buyer clients will enjoy the benefits of **Prospector**, the latest technological innovation that delivers daily service from you. Once your buyer is entered into the Prospector system, everyday your cyber agent searches the entire MLS for properties that meet your client's criteria and delivers that pertinent information in the form of an email to your client. Using technology to maximize your time is an advantage you will enjoy as a Prudential Preferred Properties agent. Prospector does the leg work for you and your clients 24/7, every day of the year.

**Velocity Marketing** allows you to provide the most accurate pricing data to your Seller and gives you the ability to predict the market direction. You will be invited to spend an afternoon learning all of the secrets of Velocity Marketing. This system is governed by a formula that predicts the velocity at which property is appreciating and empowers you to provide your client with a "snapshot" of current market values and validate upcoming fast or slow markets. This system is trademarked and only available through a Prudential Preferred Properties agent.

Another preferred advantage and a first in the marketplace is the latest in property marketing—the **Property CD-ROM and web address**. Every property you represent has its own advantages and distinctive character. We think every property that we represent deserves a broad marketing strategy - marketing can no longer be limited to placing ads in newspapers. The Property CD-ROM and web address will showcase your listing and be direct mailed to targeted brokers in the marketplace who deal in the price range and location of your listing. These tools are a part of our advanced multi-tiered marketing approach that ensures that your listing is noticed and remembered by the real estate community—an important segment in any marketing plan. Other Property CD-ROMs may be targeted to potential buyers who are delighted with the interactive format, fresh approach and innovation. Your Sellers will enjoy results that maximize the exposure and impact of their properties in the marketplace.

# ADVANCED TECHNOLOGY MAXIMIZES YOUR VALUABLE TIME

## **A Hand-Picked, Experienced Team**

You will be part of a team of seasoned professionals who, like you, are dedicated to the highest standards, quality service and personal success. New associates are trained in a separate work environment and will enter the office only after completing rigorous instruction and a pre-determined number of transactions.

## **Handsome, Superbly-Equipped Offices**

The location and condition of the office in your market area is outstanding. Professionally planned and decorated for maximum impact and ease of use, your office is complete with multiple conference rooms, an overabundance of computers, a multi-functional copier that is also a printer, access to industrial color printers, handsome desks and every amenity an agent could desire.

## **Two Points of Contact Plus**

Communication is easy at Prudential Preferred Properties. Your manager is your first point of contact and you also have a secondary point of contact. However, if in any situation those two points of contact are not providing you with satisfaction or resolution, then you simply call the President of the company—Doug Yeaman. Doug says,

“The purpose of this system is to make communication in our company very simple. We are a bottom-up driven company and we are here to serve people. I don’t want bureaucracy. I need to know when things aren’t working.”

## **State of the Art Communications Systems**

Your personal voice mail, private fax number and email are all integrated into one system. Therefore, you can hear your email messages over the telephone or listen to your voice mail messages over the speakers in your computer. We are all about making your life simpler and better through technology.

## **[www.prupref.com](http://www.prupref.com)**

Our web site holds all of the company’s contracts, calendars, forms, training schedules, the company roster and your email. All of this is available to you at any hour, anywhere in the world.

## **CMA Technology**

A Prudential Preferred Properties Listing Presentation, Marketing Plan and CMA are splendidly designed, cutting-edge and completely prepared for you.

**Your Empowering Advantages**

# ADVANCED TECHNOLOGY MAXIMIZES YOUR VALUABLE TIME

## **www.Your Personal Web Page.com**

A personal web page is essential in today's business. Technologically savvy Sellers and Buyers alike expect your arsenal of marketing tools to include web-based services and promotion. We will assist you in the set-up and management of your web page.

## **Networking**

Every desk is a virtual office with a docking station that allows your personal computer to network with all of the company systems. This gives you lightning fast access to the Internet, the MLS and printers.

## **Digital Cameras**

Digital cameras for agent use are available in every office.

## **Experienced Support Staff**

We take very seriously the important job of successfully supporting you and the functions of the office. Our administrative managers are not your average real estate office workers. They are technologically savvy, networked throughout the company and are interchangeable from office to office. Our systems are outstanding and our administrative staff will allow you to stay focused on your career path instead of your paperwork.

The Accounting and Closing Departments ensure your transactions proceed smoothly and commission checks are delivered within three days.

## **The Technology Department**

The Technology Department provides support for computers, our Internet presence and the integrated phone system. Their innovation and forward-thinking ideas maintain our lead in the industry.

## **The Marketing Department**

The Marketing Department is continually monitoring the effectiveness of our marketing strategies, communicating with our agents, clients and service providers and keeping our company in the forefront of leading-edge marketing —pioneering short and long-term tools for your ultimate success.

The Prestige Properties and Fine Homes Division corroborates with you to use our specialized marketing strategies to list, position and sell upper-tier and luxury properties.

**Your Empowering Advantages**

# YOUR SMOOTH TRANSITIONAL STRATEGY

## Maintaining Your Client Base

Our experience has shown that agents in transition to Prudential Preferred Properties often increase their business. Why?

- **Your Agent Services representative** will telephone your entire client list within 24-hours, informing them of your new affiliation and asking them about their present real estate needs or that of others who might benefit from your expertise.
- **Your Transition Coordinator** will oversee all of the details to ensure a seamless transition including:
  - Business Cards
  - Name Riders
  - Enrollment in 401K
  - Process all state and board license forms
  - Create a personal profile for you
  - Handle press releases about your affiliation
  - Ensure your client database is set-up
  - Enroll you in PruDirect if you desire
  - Set-up your personal web page
- **Your North Shore or City Marketing Specialist** will supervise the production of:
  - Brochures for your listings
  - Templates for personalization of your CMAs
  - Final CMAs for presentations
- **Prudential Preferred Properties** distinguishes itself from all other real estate companies with our steadfast commitment to “People First.” You are the most important part of our cutting edge approach to this business. Because we are a privately owned company, we can provide **Company Support** in a personal way. We recommend the following extraordinary coaching sessions. You will be amazed by their application in your already successful business.

**S.E.L.L.**<sup>™</sup> is a focus on time management and business development unlike any other. **Probing** is a focus on communication skills and creating key relationships for the success of your business. **The Quantum Home Tour**<sup>™</sup> is a proprietary licensed marketing event. Your certification in this program is a valuable tool in your personal success and development. **The Mastery Program** takes your career to the highest level. The focus is on leading a balanced life while maintaining optimum production.

# BUSINESS DEVELOPMENT PLAN FOR SHARON SMITH

**Commission Agreement:** We recognize your contribution to the success of our business. Therefore, your commission rate will start at 75% of gross commission. In the event your 12-month averaged earnings increase in accordance with our published commission schedule, then your split will be increased accordingly. Your commission earnings from your former company will be applied to the PPP schedule for eligibility purposes. This guarantee will continue through 12-31-2003.

**Compensation for loss:** In the unfortunate event that CBRB penalizes any of your commissions by lowering your commission split or imposing any other financial penalty because of your transition, then Prudential Preferred Properties will compensate you dollar for dollar.

**Personal Marketing:** We believe in your success and would like to provide to you the following:

- . To assist in creating, defining and managing a partnership arrangement with a qualified agent that would at your discretion allow you to redistribute your bottom 1/3 transactions.
- . Include you in our exclusive North Shore upper-tier marketing and networking team which will increase your exposure to obtaining and marketing Prestige Properties.
- . Marketing of your listings to North Shore and Chicago agents and clients via CD-ROM technology on all of your listings.
- . Redesign and hosting of your personal Web site at our expense for a period of one year.
- . To facilitate your National Prudential Network opportunities, we would like to provide a package to the 2001 Business Convention in New Orleans.
- . A personal photo shoot with color and black and white prints if needed.
- . Five open house signs and 10 name riders.
- . Software for management of your "Jelly Bean Jar" contacts.
- . Post Cards provided you participate in the Jelly Bean Jar Workshop and develop a group of 200 people who agree to be part of his group. We will provide to you at our expense, 200 post cards for 12 months. The establishment of this group must be complete within 2 months of your association to qualify.

#### Miscellaneous:

- . We will pay for all State & Board transfer fees.
- . We will provide E&O insurance for you until renewal date of 4/1/2003.
- . We will pay for your office voice mail, integrated fax and Internet systems.

**This offer is predicated on the presumption that your affiliation with Prudential Preferred Properties will be no later than November 19th, when this offer will expire.**



# BUSINESS DEVELOPMENT PLAN FOR SHARON SMITH

**You agree to drive your business to the highest level by committing to the following:**

- Complete S.E.L.L., Quantum Home Tour, Probing and Lead Management within your first year of affiliation with us.
- Provide your expertise and assistance as we continue to build our team.

**It is in the best interest of all parties that the terms of this agreement be deemed confidential between you and the company. Therefore, your signature below indicates your promise to keep this offer completely confidential.**

Your Signature:

---

Sharon Smith

---

Dawn McAnaney, Broker-Manager

# **A Second Sample Proposal**

# BUSINESS DEVELOPMENT PLAN FOR GLORIA MATLIN

**Commission Agreement:** We recognize your contribution to the success of our business. Therefore, your commission rate will be a lifetime career guarantee at 80% of gross commission.

**Compensation for Loss:** In the unfortunate event that CBRB penalizes any of your commissions by lowering your commission split or imposing any other financial penalty because of your transition, then Prudential Preferred Properties will compensate you dollar for dollar.

**Personal Marketing:** We believe in your success and would like to provide to you the following:

To assist in increasing your public name awareness, maintaining you business production level and attracting more buyers and sellers, we will design a personal marketing plan with timelines that will include at our expense:

- The design and production of your own unique, personal brochure.
- Your personal brochure as a CD-ROM for your more savvy clientele.
- The design, production, hand-addressing and mailing of 500 completely unique announcements.
- 200 Prudential Calendars, personalized with your photo, hand-addressed and mailed to your sphere of influence to keep you top-of-mind all year.
- The design and maintenance of your personal web site.
- Pioneer Press, Chicago Tribune, Wall St. Journal and Crane's Chicago Business Press Releases and/or subsequent ads announcing your affiliation with us. This historically generates business for you and certainly catapults your name in the local community.
- A personal photo shoot with color and black and white prints if needed.
- 20 name riders.
- Software for management of your "Jelly Bean Jar" contacts including inputting all names as needed. (including professional affiliations, social affiliations, past, present and future clients and customers, sphere of influence, etc.)
- Monthly, for two years we will create and mail for you 200 Postcards to your designated sphere of influence provided you participate in the Jelly Bean Jar Workshop. The establishment of this group must be complete within 2 months of your association to qualify.

# BUSINESS DEVELOPMENT PLAN FOR GLORIA MATLIN

To better manage your listing inventory and sell properties with greater ease, we would invite you to:

- Utilize the power and predictability of Velocity Marketing – our trademarked, patented and effective marketing and pricing strategy.
- Network nationally by attending at our expense the 2002. Prudential Business Conference in New Orleans.
- Network locally by participating in our exclusive North Shore and City of Chicago upper-tier marketing and networking team.
- Market of your listings to North Shore and Chicago agents and clients via CD-ROM technology on all of your listings.

## **Miscellaneous:**

- We will pay for all State & Board transfer fees.
- We will provide E&O insurance for you until renewal date of 4/1/2003.
- We will pay for your office voice mail, integrated fax and Internet systems.

**This offer is predicated on the presumption that your affiliation with Prudential Preferred Properties will be no later than November 19th, when this offer will expire.**

# BUSINESS DEVELOPMENT PLAN FOR GLORIA MATLIN

**You agree to drive your business to the highest level by committing to the following:**

- Complete S.E.L.L., Quantum Home Tour, Probing and Lead Management within your first year of affiliation with us.
- Provide your expertise and assistance as we continue to build our team.

**It is in the best interest of all parties that the terms of this agreement be deemed confidential between you and the company. Therefore, your signature below indicates your promise to keep this offer completely confidential.**

Your Signature:

---

Gloria Matlin

---

Joy Sarver, Broker-Manager

---

Douglas Yeaman, President

# **A Third Sample Proposal**

Dear John,

We are excited to know that you will give serious consideration to joining us soon as a member of our residential sales team. We have enclosed a Business Development Plan which reflects our conversations. We are committed to providing you with the support described within the plan upon your affiliation with Prudential Preferred Properties.

Please review, and let us know if you have any questions, or if there is something we inadvertently omitted.

Please let us know at your earliest convenience the date you will be joining our staff. We will set up an appointment with Mari Falanga, our transition coordinator, to process all the details of your transition.

Looking forward to working together!

Sincerely,

David Bracy  
Regional Director of Agent Productivity

Byron Clark  
Edgebrook Office

# Business Development Plan

Prepared for:  
John Caravette

Prepared by:  
Byron Clark and David Bracy  
Prudential Preferred Properties



## Prudential Preferred Properties

### General Support

Transition Coordinator –Mari Falanga *will oversee all details regarding your move to ensure a seamless transition.*

- Business Cards
- Announcements
- Name Riders
- Open House Signs
- Telemarketer (*Your entire client list will receive a call informing them of your new position within 72 hours*)
- Process all State, Board License Forms
- Process all Company Personnel Forms
- Press Release
- Profile of Success
- Client Data Base Setup
- Enrollment in Personal Marketing Post Card Program –*optional at agent's expense*

Support Staff – Nicole Novak *is the Edgebrook office Administrative Manager. She is a seasoned professional who is well versed in all facets of running a real estate office.*

Holly Drucker *is our Direct Mail Marketing Specialist. Holly manages our post card program... Together our support staff provides the following services for you.*

- Develop Personalized CMA Pieces – *“Choosing the Right Realtor”, “Testimonials”, “Recent Sales”*
- Develop Letter Templates – *These templates can then be personalized by you with ease.*
- Produce CMA's
- Produce Property Brochures
- Create, Produce & Mail Personal Marketing Post Card Program

**Company Support** – *Because we're a privately owned company, we can provide support in a personal way. Our goal is to help free up your time and enable you to develop your business.*

- **Professional Development Support**
  - **Business Coaching** – *Action group focus is business development. Transaction group focus is competency.*
  - **Training:**
    - S.E.L.L – focus on time management & business development.*
    - Probing – focus on communication skills that help determine the needs of buyers & sellers and creates relationships that are key to business success.*
    - Quantum Home Tour – a proprietary licensed marketing event. Managed by a marketing team of certified agents, this event creates attendance at the week-end QHT that far exceeds a typical open house. This marketing event typically results in the sale of the property within 3-4 weeks of the event, as well as providing additional business for the team members.*
    - Masters - The Master's Program will be available to you when you are ready to take your career to the highest level. The focus is on leading a balanced life while maintaining optimum production.*
    - Journey to Mastery – new agents are trained in a separate work environment under the leadership of their own manager.*
- **Call Center**
  - **Receptionist**
  - **Agent Services** – *Books appointments*
  - **Ad Response Team** – *Books appointments for customers in need of real estate services*
  - **Leads Management Team** – *provides follow-up for future clients & maintains data base of profiled buyers*

- Technology Department – *Provides tech support for computers & phones.*
  - Phones – *“Find Me Feature” and private Fax Number*
  - Computer Network – *Includes individual desk network hook up for your lap top*
  - Sales Associate Web Page – *Set up and management*
- Accounting Department – *Commission checks within 3 days*
- Marketing Department – *available for special projects – new construction, Prestige Properties, Developments, target marketing, etc.*
- PR Department
- Temporary Employment Staff – *for specific projects, illness and seasonal work load*
- Experienced Support Staff – *networked throughout the company with interchangeable duties & responsibilities*
- Mortgage Support
- Hand Picked Experienced Sales Associates – *You will be part of a team of seasoned professionals all dedicated to the highest standards. New associates will be trained in a separate work environment*

# **Business Development Plan for John Caravette**

**Commission Agreement:** John will start at 70% of gross commission. In the event his 12 month averaged earnings increase in accordance with PPP's commission schedule, then his split will be increased accordingly (the accrual will be for 15 months in year one). Commission earnings from current company will be applied to the PPP schedule for eligibility purposes.

**Compensation for loss:** If the Coldwell Banker Residential Brokerage penalizes John by lowering his commission split (or imposes any other penalty) on commission due him, then Prudential Preferred Properties will compensate John dollar for dollar.

**Personal Marketing:** PPP will provide the following:

- Initial announcement cards and postage
- Initial sets of 1000 non-photo and 1000 photo business cards
- Five open house signs, ten name riders
- PPP will provide software for management of "Jelly Bean Jar" contacts.
- Post Cards: On the condition that you participate in the Jelly Bean Jar Workshop and develop a group of 200 people who agree to be part of his group, PPP will pay for 200 post cards for 12 months. Establishment of 200 JBJ must be complete within 2 months of association.

## **Miscellaneous:**

- PPP will pay for all State & Board transfer fees.
- PPP will provide E&O insurance for year one of association.
- You agree to complete S.E.L.L., Quantum Home Tour, "Probing" and Leads Management within your 1<sup>st</sup> year of affiliation with us.
- You agree to help as we build our Edgebrook Team.
- It is mandatory that the terms of this agreement be confidential between John and Barbara and PPP

Agreed this \_\_\_\_ day of \_\_\_\_\_, 2001

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*Associate*

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*Associate*

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*Broker*

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# Coaching

# Foundation for the Training

**The MASTERS™ Coaching Program is designed to help you identify ways in which you will become more effective. The success of the program requires the following:**

1. Attendance to each and every module
2. That any participant who decides not to complete the training will return to complete his\her relationship with the group.
3. Attendance on time to each session. Returning on time from breaks. Housekeeping for late participants will be done as a group process.
4. No smoking in the training room.
5. That trainings begin at 10:00 a.m. [or 2:30 p.m.] and end approximately \_\_:00 a/p.m ; breaks will be approximately 15 minutes each.
6. That each participant commits to being open, willing to be confronted, and willing to actively participate in each session, and specifically to tell the truth and be honest. Additionally, each participant agrees to show respect and compassion for everyone in the group.
7. That the content of the training is a private and confidential matter between you and the group. All materials, forms, concepts and conversations shall be kept strictly confidential.
8. That each participant commits to reviewing their vision daily and will make daily commitments relevant to their vision, except when vacationing. Vacations are to be scheduled in advance.
9. That each participant commits to managing and integrating his/her life in the areas of work, personal, health and recreation. Each participant agrees to support each other in the face of negativity and resistance; and each participant agrees specifically not to compete with anyone in this group.
12. That no alcohol or drugs will be ingested 12 hours prior to each session.
13. That all portable paging and phone systems are to be turned off.
13. That each commits to developing a measurable vision statement, annual goals and plan of action for the duration of the program.
14. That each participant commits to enrolling his/her personal and professional relationships in supporting him/her in this program.
16. That any changes require unanimous agreement from the group.
17. That the communication during the training is with the trainer, or the group as facilitated by the trainer, or with the cluster/partner when working in cluster/partner groups.

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

# Foundation for the Training

**The Orbit™ Training Program is designed to help you identify ways in which you will become more effective. The success of the program requires the following:**

1. Attendance to each and every module or training
2. That any participant who decides not to complete the training will return to complete his\her relationship with the group.
3. Attendance on time to each session. Returning on time from breaks. Housekeeping for late participants will be done as a group process.
5. That each participant commits to being open, willing to be confronted, and willing to actively participate in each session, and specifically to tell the truth and be honest. Additionally, each participant agrees to show respect and compassion for everyone in the group.
6. That the content of the training is a private and confidential matter between you and the group. All materials, forms, concepts and conversations shall be kept strictly confidential.
13. That all portable paging and phone systems are to be turned off or no ring and NO texting.
13. That participation shall be balanced with no single person dominating and everyone participating fully.
17. That the communication during the training is with the trainer, or the group as facilitated by the trainer, or with the cluster/partner when working in cluster/partner groups.

**Signature** \_\_\_\_\_

**Date** \_\_\_\_\_







# QUANTUM'S MASTERS™

## BUSINESS

## PLAN

## WORKSHEETS

“A YEAR WITHOUT CLOSED LOOP THINKING.”

DOUG YEAMAN



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Closed Transactions

Fiscal/Calendar Year \_\_\_\_\_

Property Address	B.C.S. ✓	L.S. ✓	Sales Price	Commission Earned
<b>TOTALS</b>				

1. # Closed Transactions \_\_\_\_\_
2. Total volume closed transactions (add sales prices) \_\_\_\_\_
3. Average sales price (line 2 ÷ line 1) \_\_\_\_\_
4. Total commissions earned \_\_\_\_\_
5. Average commission (line 4 ÷ 1) \_\_\_\_\_

\* If you sold your own listing, count each side as 1 transaction



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Listings Taken

Fiscal/Calendar Year \_\_\_\_\_

Property Address	Date Sold	Date Expired or Taken off Market	Reason Didn't Sell

- 1. # Listings Taken \_\_\_\_\_
- 2. # Listings Sold \_\_\_\_\_
- 3. % of Listings Sold (line 2 ÷ line 1) \_\_\_\_\_



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Sources of Business

Fiscal/Calendar Year \_\_\_\_

BUYER CONTROLLED SALES	
Property Address	Source of Business

Enter totals for the following categories:

### ***From Quantum Home Tour™ Sources:***

Buyers from Quantum Home Tour™	_____	Listings from Quantum Home Tour™	_____
Jelly Bean Jar™	_____	Jelly Bean Jar™	_____
QHT FSBO's	_____	Referrals	_____
QHT Expireds	_____		

### ***From Non Quantum Home Tour™ Sources:***

Jelly Bean Jar™	_____	Broker referral	_____
FSBO*	_____	Past Client*	_____
Relocation Referral	_____	Advertising	_____
Floor time	_____	Relative*	_____
Expireds*	_____	Friend*	_____
Internet*	_____	Geo Farm	_____

\* Non Jelly Bean Jar™ Business

Identify areas for possible improvement:



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Sources of Business

Fiscal/Calendar Year \_\_\_\_

BUYER CONTROLLED SALES	
Property Address	Source of Business

Enter totals for the following categories:

- |                |       |                     |       |
|----------------|-------|---------------------|-------|
| Jelly Bean Jar | _____ | Broker referral     | _____ |
| Open House     | _____ | Relocation Referral | _____ |
| FSBO           | _____ | Past Client         | _____ |
| Floor time     | _____ | Relative            | _____ |
| Expireds       | _____ | Friend              | _____ |
| Other          | _____ | Other               | _____ |

Identify areas for possible improvement:

# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Business Expenses (Marketing)

Fiscal/Calendar Year \_\_\_\_\_

		Past Year	Plan Year
1.	Newspaper Ads	_____	_____
2.	Magazine Ads	_____	_____
3.	Yellow Pages Ads	_____	_____
4.	TV/Radio	_____	_____
5.	Direct Mail	_____	_____
6.	Church/Club Directories	_____	_____
7.	Promotional Flyers	_____	_____
8.	Postage	_____	_____
9.	Yard Sign/Riders, etc.	_____	_____
10.	Photography	_____	_____
11.	CB Marketing Tools	_____	_____
12.	Personalized Marketing Tools	_____	_____
13.	Quantum Home Tour™	_____	_____
14.	Other	_____	_____
<b>TOTAL MARKETING EXPENSES:</b>			



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Other Than Marketing

Fiscal/Calendar Year \_\_\_\_\_

1. Auto (lease or loan payment)
2. Auto Expense (gas, maintenance)
3. Insurance (Auto)
4. Insurance (E&O)
5. Dues (Clubs, Organization, etc.)
6. MLS Membership
7. Professional Books/Tapes
8. Phone
9. Office Supplies
10. Equipment (FAX, Software, Copy Machine, Pager)
11. Computer (Hardware)
12. Seminars
13. Lock Boxes
14. Professional Services (Accounting, Attorney, etc.)
15. Secretarial/Personal Assistant Services
16. Sales Conferences (CB Annual Conference, NAR, CAR)
17. Licenses
18. Gifts
19. Business Periodicals (Magazines)
20. Entertainment
21. Other
22. Other

	Past Year	Plan Year
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<b>TOTAL BUSINESS EXPENSES:</b>		

# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Business Expenses Analysis

Fiscal/Calendar Year \_\_\_\_\_

Total Gross Commissions 1. \_\_\_\_\_

Expenses:

Marketing: \_\_\_\_\_ (1a)

Other than marketing \_\_\_\_\_

Total: 2. \_\_\_\_\_

Profit or (Loss) 3.  
(Subtract Line 2 from Line 1)

What percent of every dollar is invested back into your business?  
(Line 2 ÷ Line 1) 4. \_\_\_\_\_

What percent of every dollar is invested in personal marketing?  
(Line 1A ÷ Line 1) 5. \_\_\_\_\_

After completing this analysis, identify your opportunities for greater effectiveness:





# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Production Analysis of Previous Year

Fiscal/Calendar Year \_\_\_\_\_

1. Total Commissions Earned (gross) \_\_\_\_\_

### LISTING SIDE

2. Number of Listings Taken (L/T) \_\_\_\_\_

3. Number of Listings Sold (L/S) \_\_\_\_\_

4. % of Listings Sold to Listings Taken (line 3 ÷ line 2) \_\_\_\_\_

5. Total Volume of Listings Sold (add sales prices of all L/S) \_\_\_\_\_

6. Average Sales Price of Listings Sold (line 5 ÷ line 3) \_\_\_\_\_

### SELLING SIDE

7. Number of Buyer Controlled Sales (BCS) \_\_\_\_\_

8. Total Volume of BCS (add sales prices of all closed BCS) \_\_\_\_\_

9. Average Sales Price of BCS (line 8 ÷ line 7) \_\_\_\_\_

### UNIT TOTALS

10. Number of Listings Sold (line 3 above) \_\_\_\_\_

11. Number of Buyer Controlled Sales (line 7 above ) \_\_\_\_\_

12. Total Closed Units \_\_\_\_\_

### AVERAGE INCOME PER UNIT

13. Total Commissions Earned (line 1 above) \_\_\_\_\_

14. Total Closed Units (line 12 above) \_\_\_\_\_

15. Average Commission Earned Per Unit (line 13 ÷ line 14) \_\_\_\_\_

16. % of Business from Listings Sold (line 3 ÷ line 14) \_\_\_\_\_

17. % of Business from Buyer Controlled Sales (line 7 ÷ line 14) \_\_\_\_\_



# QUANTUM'S MASTERS™ BUSINESS ANALYSIS

## Productivity Plan for Next Year

Fiscal/Calendar Year \_\_\_\_\_

<u>Year**</u>	<u>Past Year*</u>	<u>Plan</u>
<b>1. Total Commissions</b> <i>(Multiply past year by minimum of 125%  or enter desired figure)</i>	_____	_____
<b>2. Percentage of increase</b> <i>(Take difference between past year and plan year  and divide by past year income)</i>	_____	_____
<b>3. Total closed units</b> <i>(Plan Year Line 1 ÷ past year average commission )</i>	_____	_____
<b>4. # of Listings Sold</b> <i>(Production Analysis line 16 × Plan Year line 3)</i>	_____	_____
<b>5. # of Listings Taken</b> <i>(Plan Year line 4 ÷ Production Analysis line 4)</i>	_____	_____
<b>6. # Closed Buyer controlled sales</b> <i>(Plan Year line 3 × Production Analysis line 17)'</i>	_____	_____
<b>7. # Listings needed each month</b> <i>(Plan Year Line 5 ÷ 12)</i>	_____	_____
<b>8. # Buyer Controlled Sales needed each month</b> <i>(Plan Year Line 7 ÷ 12)</i>	_____	_____

\* Enter past year figures on lines 1, 3, 4, 5, 6 only

\*\* Follow *italized* computation instructions to determine plan year figures



## VISION MANAGER SUPPORT

### PROBLEM DISASSOCIATION

#### EXAMPLE:

##### **Partner does not achieve committed outcome:**

Before attempting to “handle” the problem be sure that you are clear as to the intended support involved...no judging and no criticizing or fixing.

Use the following language to “Empower the Solution”:

1. What do YOU have to do...?
2. What will YOU need to do...?
3. What will YOU need to know...?
4. What would YOU suggest...?
5. What do YOU think might (work, solve, cause)... to happen?
6. What has to happen in order for... to happen?
7. What can YOU do in order for ... to be (resolved, solved, concluded, put together, handled)?
8. Given that we are (not going to, not ready to etc.) (what could YOU do, how are YOU, how could YOU)...?

#### EXAMPLE:

##### **Partner does not call as agreed or does not support you:**

#### Language:

1. What you are doing is not working for me.
2. I understand how you feel.
3. What has to happen for you to \_\_\_\_\_ with me?
4. What can I as your vision partner do to support you? What will you need to do in order for it to work for you?

Identify the issue. Create alignment, not control.

Use foundation as last resort. Use *FEEL, FELT, FOUND*.

#### Language:

What is it that is not working for you?

Are you willing to have it work?

What will you need to do in order to have it work for you?

What can I (we) do to support you?

What has to happen for us to be supporting of you?

What has to happen for you to be willing to be supported by me?



# Pathfinding — Implementation — Results

Visions	Relevant Steps	Commitments	Results
<b>A</b>	<b>1</b> _____ <b>2</b> _____ <b>3</b> _____ <b>4</b> _____	_____ _____ _____ _____	_____ _____ _____ _____
<b>B</b>	<b>1</b> _____ <b>2</b> _____ <b>3</b> _____ <b>4</b> _____	_____ _____ _____ _____	_____ _____ _____ _____
<b>C</b>	<b>1</b> _____ <b>2</b> _____ <b>3</b> _____ <b>4</b> _____	_____ _____ _____ _____	_____ _____ _____ _____
<b>D</b>	<b>1</b> _____ <b>2</b> _____ <b>3</b> _____ <b>4</b> _____	_____ _____ _____ _____	_____ _____ _____ _____

## Work

I work with anticipation, enthusiasm and joy. Abundance surrounds me and I embrace it into my life. Business comes to me effortlessly. I inspire confidence in my clients and colleagues. Clients are comfortable with me and rely on my expertise. I conduct my business with honor, integrity, honesty, and efficiency. I call my jelly bean jar on a monthly basis with great success enabling me to avoid prospecting in ways that are less productive. My home is paid for and adequate money is available for the future. I am able to provide assistance for my children and grandchildren if needed or just because I want to.

1. Appointment each day
2. Working jelly bean jar (contact each month)
3. Continuing education (set plan to get gri, abr, crs)

## Family

I am able to spend time each day conversing with various family members. We are able to talk and share the most intimate and important ideas. My grandchildren look forward to spending time with me feeling safe and secure. I am the matriarch that expounds love and joyful experience by sharing quality time. I am an example to each member of my family.

1. Telephone conversations with various family members at least weekly
2. Family dinners or get-togethers at least once a month
3. Spend quality time doing something special with grandchildren each month

## Health – Recreation

I enjoy and find ample time to exercise my body and mind finding great personal satisfaction in each endeavor. I spend time learning and doing new, invigorating, rewarding activities. I personify exuberance and vibrance in all that I do. I have energy to do all that I want to do.

1. Exercise or physical activity (at least 4 times weekly for 30 minutes)
2. Become diet conscious, eat right and choose healthy foods over fast foods
3. Meditation – self affirmations on a daily basis

## Relationship-Personal

I enjoy being in activities that develop relationships that are mutually stimulating and rewarding. Friendships are numerous and provide food for the soul, satisfying, and joyful. I am open to a meaningful lifetime relationship with a man that shares my enthusiasm for life. He encourages and inspires me to excel in all areas of my life, to be the best I can be, as I do for him. I strive daily to expand my spiritual intellectual depth. I take time to listen to my heart and soul – KNOWING where my spirit will lead me. I enjoy doing service projects in a number of arena's. I am comfortable with who what I am. Life is a mysterious adventure of discovery and I strive each day to unravel my personal past and future mysteries.

1. Join a variety of groups (Sorority, Ed Committee; Associate Council;
2. Spend time with friends
3. Read, study, listen to spiritual uplifting material