



MANAGER'S CLUSTER REPORT & EXCEPTION LIST

Name _____

Date _____

Section I Attendance

Number of people in cluster _____

Number present _____

Number excused _____

Number no show _____

Total (Must balance) _____

Names of no shows

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

Section II Results

Number of escrows opened _____

Number of escrows closed _____

Number of listings taken _____

People not making standard

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

5 min

Section III Time Management

Yes No

- Check to see agent is using system
- Check monthly calendar (scheduled events)
- Daily work planner for every day worked
- Logging P I N's
- Check "I" time (15-20 hrs)
- Check "P" time (10-15 hrs)

People off of TM System

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

10 min

Section IV Review Week

Write all leads on "post-its" collected during week

Lead name
Phone number
Address
Agent's name
Quantum Open House™ name

Write all new clients on "post-its" acquired during the week

Write all Certified Buyers on "post-its"

Agents place "post-its" in category on board

10 min



QUANTUM
MANAGEMENT
SYSTEMS

Board drawing goes here!!!



MANAGER'S CLUSTER REPORT & EXCEPTION LIST (cont'd)

Section V Analysis

Board will tell story - manager will target group

Open Houses _____
 Fliers passed out _____
 Names & numbers collected _____
 Appointments made _____
 Certified Buyers _____

People not holding Open Houses

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

(Schedule a 1:1 with manager)

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

1. Each person takes out Daily work planner for Monday.
2. Look at each lead & plan next step.
3. Look at each client to see what has to happen to put transaction together.
4. Role play phone scripts.
5. Role play Quantum Open House™ leads.
6. Role play confirming calls.
7. Role play floor time appointments.

30 min

Names of people with no appointments

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

Work 1:1 on phone script

Names of people with no committed buyers

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

Work 1:1 on Probing

Section VII Taking Action

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

People not calling partner each day

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



MANAGER'S CLUSTER REPORT & EXCEPTION LIST (cont'd)

Section VII Cluster Reports Back

1. Have garbage can ready.
2. Agents move "post its" to appropriate category.
3. False numbers, "not interested", leads are dropped into garbage.
4. Clients are certified or dropped into garbage.
5. Agents who "could not reach" their clients report back at 7:00 P.M. for further phoning.

*Board will now tell a new story.
Manager targets where group is breaking down.*

20 min

Section VIII Schedule New Week

1. Assign Quantum Open House™ signs and fliers.
2. Write in appointments (Probing/Drop bys).
3. Write in appointments to show property.
4. Schedule day off.
5. Schedule time to pass out fliers & talk with neighbors.
6. Schedule time to follow up on Quantum Open House™ leads:

Guidelines

2 open houses 4 hrs each	=	8 hours I
" Pass out fliers 3 hrs each	=	6 hours I
" Follow up calls 1 hr each	=	2 hours I
6 appt to drop by or probe 2 hrs each	=	12 hours I/P
2 appointments to show Property 3 hrs each	=	<u>6 hours P</u>
		34
		10 N time
		<u>44 hour week</u>

10 min

7. Each agent **commits** to weekly schedule.
8. Manager gets copy, team leader gets copy.
9. Commit to talk with partner each and every day to hold accountable to schedule for week.



SCHEDULE

SAMPLE MANAGERS SCHEDULE OF THE DAY



**MANAGER'S SCHEDULE
MONDAY**

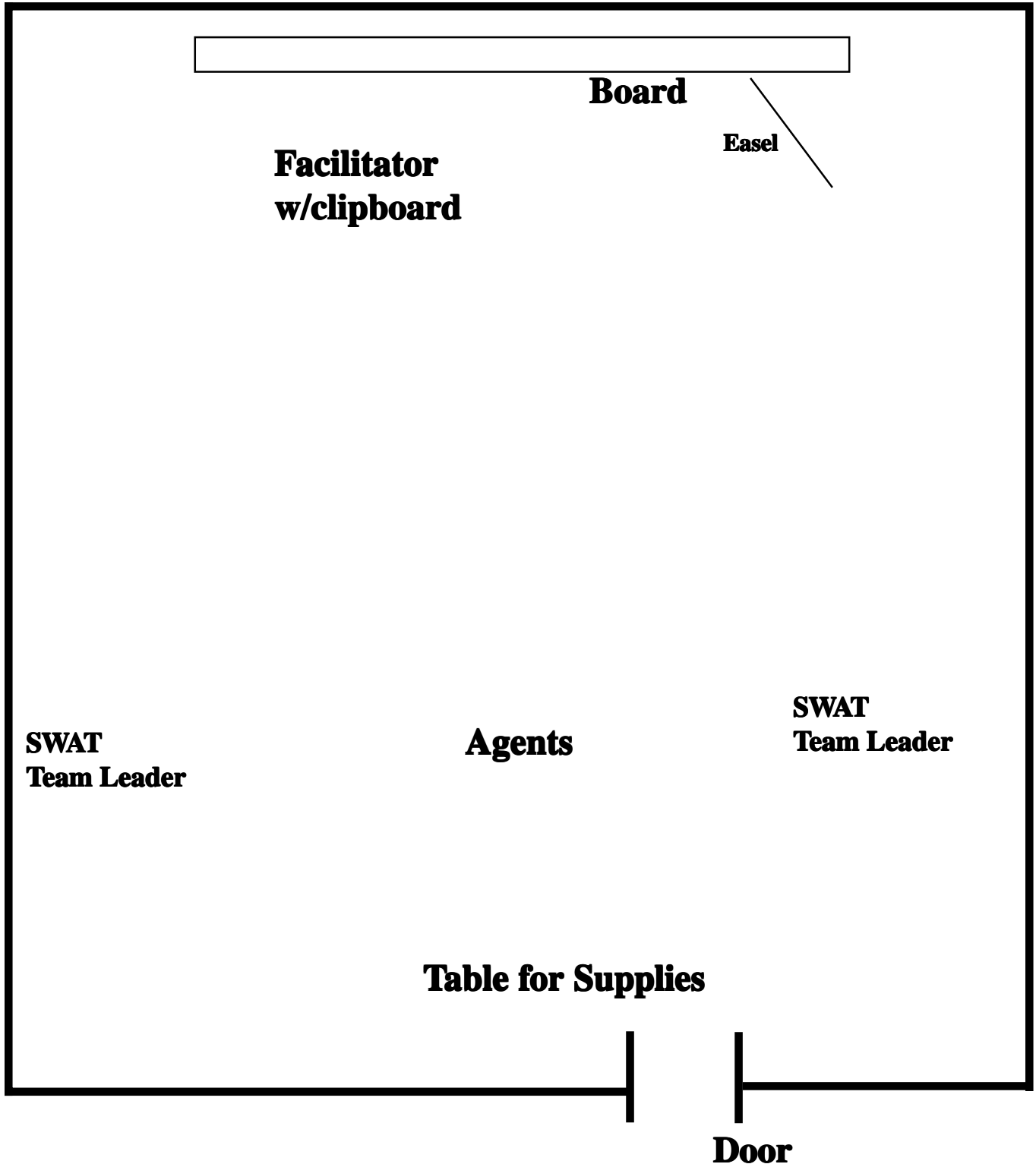
7:00		
8:00		
9:00		
10:00	Begin Action Monday in Clusters with Masters (Training Coordinators)	
11:00	Take Statistics -- Make certain all leads are identified and under control !	
12:00	Certify Buyers -- Make certain all Buyers have plans of action and follow up on past	
1:00	Set new personal plans of action	
2:00		
3:00		
4:00		
5:00		
6:00		
7:00		
8:00		
9:00		
10:00		



SET-UP & SUPPLIES



Ideal Room Setup



SUPPLIES NEEDED

1. Conference room
2. Wipe on/wipe off board marked with tape
3. Chairs
4. Quantum Open House™ inventory
5. Signs
6. Fliers/invitations (Stock supply, write in address)
7. “Post its” in different colors (1 color for each cluster)
8. Pencils
9. Clock
10. OT&M forms
11. Garbage can
12. Phone scripts
13. Air conditioning (69 degrees)
14. Kleenex
15. Weekly schedule
16. Clipboard
17. Check list
18. Easel with easel pens
19. Tape recorder
20. Telephone suction cup



TRAINING

#1



TRAINING APPOINTMENTS

ITS FEAR

Remember, when you put off your calls, it's fear.

False
Evidence
Appearing
Real

What false evidence have you created being real?

List them on the easel

Examples: Too late to call; Too early; Open houses don't work; I don't feel well; I'll do it tomorrow.

Get real ones from the cluster.

BITE THE BULLET

What is the worst that can happen - If you don't make your calls you don't have appointments, no appointments, no relationships, no relationships, no money.

1. List five experiences you will feel by not making calls
2. Now find the assumption about you.
3. Say it out loud to group
4. Re-write the assumption.
5. Say the new affirmation out loud.

ROLE PLAY SCRIPT

Confirm calls

Quantum Open House™ leads

Floor calls

IDEAS

*Play any tapes you have with agents making appointments



*Managers demonstrate how easy it is to make appointments by getting on telephone.

*Share any fears

**AGENTS WHO DO -
DO**

Just do it - *if you're scared*

Just do it - *if you're embarrassed*

Just do it - *if you don't know what to do*

JUST DO IT



TRAINING

#2



QUANTUM OPEN HOUSE™ TRAINING

PURPOSE

MARKETING PLAN

Manager is responsible for context of Quantum Open House™. Your job is to create a “proof source” that open houses work. Condition is set up to create a fertile training ground to train in groups.

OBJECTIVE

To schedule appointments with 60% of all guests who attend.

SECONDARY OB- JECTIVE

To train licensees with on the job training in producing results from open houses

**End of Tour
Kitchen Area**

**3 Punch Bowl
w/ Cookies**



**1 Hostess with
Guest Register**

Agent

**Company
Display**

**2
Area to
Take Survey**

**Small room for
debriefing trainees**

**Childrens
Area**



SET UP

Choose house to hold open

Choose weekend that is most workable

Map out a strategy to place signs that will attract and direct traffic to Quantum Open House™.

Place a **minimum of 50 Quantum Open House™ signs** at strategic intersections.

Have a **guest registration table**

Guest register

Survey Questionnaire

Clipboards

Punch bowl with cookies

Brochures on other current open houses

Display of your **company logo** and **company listings**

Pencils

Note pads

Quantum Open House™ **fliers**

Crayons, book, small children's table, chairs

**AGENTS CHECK
LIST**

Dress in **business attire** (if appropriate wear company uniform)

Hair, nails, shoes, etc. **immaculately groomed**

Breath fresh (mints)

Calendar or note pad

Name Badge



Three places where guests give their name and phone numbers

1. Guest register
2. Survey questionnaire
3. Agents when booking an appointment

Purpose for the repetition of names & numbers is to be able to cross reference numbers and to deter guests from giving phony numbers. (It's easier to lie once than three times)

**AGENT BE OPEN &
SHARE**

Purpose of survey cards is to slow guests down and set a pace that will allow receptivity for a relationship. Also information on survey provides profile of respondent.

Purpose of punch and cookies is to further slow guest down and set a pace that is conducive to establishing a relationship. Agents need to be trained to move guests from property to relationship. Guests come in with mind-set called "I want to see this property." Agents need to bridge a conversion from property to relationship. Timing is critical, slowing down guests and relaxing pace sets up condition for guest to make transition.

**NEW LICENSEE
TRAINING**

**CONDUCTED IN
CLASSROOM PRIOR
TO QUANTUM OPEN
HOUSE™**

Broker sets up trainees to show up at Quantum Open House™ in clusters at scheduled time frames. One cluster every hour, 4 to a cluster

**STEP ONE - INVIT-
ING YOUR GUESTS**

Trainees are trained in classroom prior to Quantum Open House™ and is given 10 fliers/invitations. Broker demonstrate how to invite guests and to get a commitment from them that they will attend the Quantum Open House™.

(See attached)



EXAMPLE

ROLE PLAY

INVITATION SCRIPT

Knock, knock.

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 couple of minutes to talk?

(Get yes - Establish permission)

Our company is holding an Quantum Open House™ in your neighborhood and we have been getting allot of interest in it. We want to invite you and your family to come and see the home.

Are you free today between noon and six?

Good!

How would you feel about stopping by and supporting your neighbors in selling their home? When you see the house it may remind you of someone you know who would like to live in your neighborhood. The _____ would appreciate any friendly referrals you could offer that would help them. How about dropping 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



Trainees are then assigned an area and given their time to report to Quantum Open House™. Assign exact time for return. Have them bring back the names of the people who committed to come to the Quantum Open House™.

STEP THREE - CLUSTER SHOWS UP AT QUANTUM OPEN HOUSE™

Hold accountable for getting commitments. Debrief on what worked, what didn't. Did they get commitments? How many names?

Training on "YES" means commitment.

Anything else means NO. I plan to sounds good, I'll talk to my husband are not commitments.

STEP FOUR - SCHEDULING APPOINTMENTS AT QUANTUM OPEN HOUSE™

Take cluster into briefing room and walk them through Quantum Open House™ procedure

1. Guest is welcomed and agent introduces self.
2. Guest signs in at guest register. Host/ess explains that seller wants all people to register.
3. Guest fills out survey. Make sure it is complete, name, address etc. Again, purpose is to slow client down and get into relationship. Children are left in play area. Hostess supervises children. Babies go with parents.
4. Walk through home with guest. Talk about relationship "stuff". Examples: Pets, similar experiences, skiing. Be open and personal, share yourself. Do not talk about house.



5. When you get to end of tour, kitchen area, offer them some cookies & punch and continue to relate. Remember, slow down pace to create conditions for appointment. Slow Down means to shift from property to relationship. Attention is on relationship "stuff". Not property.
6. Ask for appointment
 - a. When would be a good time to discuss this in depth.
 - b. Have calendar, book appointment. Repeat name, address & phone number. Make appointment within next 72 hours.
 - c. If guest says "I already gave my name and number, explain that was for the seller, this is for me.
 - d. Make sure appointment is for the next few days, not weeks away. (Remember, more than two weeks they are suspect, not prospect, not client.)

**STEP FIVE - EXCUSE
CLUSTER**

Each trainee will now take a real live body through the procedure and ask for appointment.

STEP SIX

Trainee reports back. Each trainee goes into briefing room and debriefs experience. Did you make the appointment? Why not? What works, What didn't? What got in the way? Why are you here? Ask three times for appointment.

STEP SEVEN

Repeat process until trainee gets appointment. Appointment will be referred to licensed agent to continue process.

Quantum Open House™ continues until closing by alternating clusters with passing out fliers and assisting the guests.

All trainees report to ACTION MONDAY™.



TRAINING

#3



TRAINING PROBING

REVIEW

Best place to probe:

1. Your office
2. Their home
3. Coffee shop

Where not to probe:

1. Over telephone
2. In car
3. As you're walking through a house

3 THINGS TO RE- MEMBER

1. Ask permission to begin 5 min
2. Crystallize on benefit - not feature
3. You can't blow it

NAME THE 14 BENE- FITS

Write features on easel, then ask "*Which means that...*"

To convert feature to benefit

FEATURE

Large yard
Pool
Library
Back from curb
Fire place
Sprinkler system
Spa
Ten car garage
Burglar alarm
Old Victorian

BENEFIT

Prestige, value
Health, recreation
Education
Privacy
Comfort, economy
Convenience
Sex
Love/Self actualization
Safety, security
Aesthetics

5 min



1. Describe for me
2. Tell me
3. What are your feelings
4. What are your attitudes

ROLE PLAY

Ideas - choose one for group

- Break into partners & role play
- Ask an agent who is real effective for model to the group
- Manager probes a participant in group
- Tape record a real situation with a client & play it back
- Video a role play situation and play back at cluster meeting



BUYER CERTIFICATIONTM

Fill out Committed Buyer ChecklistTM

- Check first section and certify
- Use close set-up
- Set next appointment (Remember: If no appointment, no client. No offer in 2 weeks, no client)
- Come back to office. Meet w/ manager & clients or find property & write offer on property you are going to find.

Remember: If terms are not clear enough to write real offer without address & amount then they have not been probed.

SHOWING BUYER PROPERTY AP- POINTMENT

Fill out offer and deposit receipt in blank and clipboard. Give to client to hold while showing property.

- Meet with manager to pre-write offer on property yet to be found.
- Give clipboard with incomplete offer to buyer to hold while agent does other things, i.e. drive auto, show property, Quantum Open HouseTM with keys. (Remember this communicates to client that we are looking for an offer to present...not looking at property.)



**AFTER SETTING
THE APPOINTMENT**

“I will line up properties for you to write offers on. Before we see the property, I need for us to have an understanding. What is important to me is that you make a decision on each property we see. It doesn't matter what your decision is, it's just important to me that you make a decision so I can tell where I am with you and that I am hearing what it is you're saying with respect to finding your property. A 'no' is just as important as a 'yes'.”

“I don't want you to feel pressured or pushed into something, I just want you to make a decision.”

“So _____ (DAY) _____ when we are seeing your property, be sure to have your checkbook with you so you can write the offer on the property you choose. Again, if you don't want the home, don't write the offer. If you do want the home, be prepared to write the check right then and there.”

“I will go ahead and prepare much of the paperwork on the offer and have it ready before we leave my office on _____ (DAY) _____.”



TRAINING

#4



TIP ANALYSIS TRAINING

DEFINITIONS

- P** = Productive
I = Indirectly productive
N = Non-productive

DAILY WORK PLANNERS

1. Take daily work planners out of time management system.
2. Number each daily work planner in upper right hand corner.
3. Log all **P, I, N**.
4. Fill in box, in the lower right hand corner:

- T** = Total hours worked
I = Total I time
P = Total P time

TIP ANALYSIS FORM

1. Write name in upper corner.
2. Write in date.
3. Write in beginning date of analysis to ending date of analysis.
4. Transfer the totals from your daily work planners to the **TIP** analysis form.
5. Make sure you have an entry for each daily work planner.
6. Total each column at the bottom.



FIND TOTAL N TIME

Add the total **I** and the total **P** time

Subtract this total from the total hours worked:

$$\mathbf{T - (I + P) = N}$$

gives you the total non-productive time.

COMPUTE PER- CENTAGES

To compute percentages:

P time - total **P** time divided by **Total**
hours worked

I time - total **I** time divided by **Total**
hours worked

N time - total **N** time divided by **Total**
hours worked

Round decimals five and above up to the next whole
number.

Round decimals four and below down to the next
whole number.

Percentages must add up to 100 %.

FIND AVERAGE HOURS WORKED PER DAY

Divide the total hours worked by the number of daily
work planners.

EXAMPLE:

150 total hours = "**T**"

15 daily work planners = $\mathbf{T(150) \div 15 = 10}$

10 is average hours worked per day

FIND AVERAGE HOURS OF N TIME PER DAY

Multiply average hours worked per day by percent-
age of **N** time.



EXAMPLE:

10 hours average worked per day = 10X.73=
73% of time is **N** time 7.3 **N** Hrs
7.3 hours per day are non-productive

FIND YIELD RATIO

I divided by **P** = yield ratio

EXAMPLE:

20 hours **I** time = 20/15=1.3

15 hours **P** time

1.3 is the yield ratio

Yield ratio is how many hours of **I** time it takes to get
1 hour of **P** time

Yield ratio needs to be low (3 or below)

ANALYSIS

In an ideal situation time is distributed equally into
thirds

1/3 - **P** time

1/3 - **I** time

1/3 - **N** time

With new licensees you will find very little **P** or **I**
time and much of **N** time.

*Focus these agents on converting **N** time to **I**
time, and the **I** time to **P** time.*

With intermediate licensees you will find a lot of **I**
time with little or no **P** time.

*This means they are prospecting but not con-
verting into relationships, they may need help
on their presentations.*

High yield ratios mean they are not converting **I** time
to **P** time.

One hour **P** time is worth a minimum of \$400 to an agent.

This gives them an idea of how much money they are on track to make.

No **P** time means no money

**TWO WAYS TO
INCREASE PRODUCTION**

1. Convert more **N** time to **I** time, **I** time automatically converts to **P** time.
2. Take a day off, you make same amount of money in less time.



TRAINING #5



Memorization of Script

NOTE: *Do not permit new Associates to claim that they are not capable of memorizing the script—Anyone can do it. Here is how:*

Associates begin by reading the scripts and carefully preparing “flash-cards,” that is, three-by-five cards listing key words in the script. These are used as “cues” to help them recall the content of the scripts.

If the Associate plans to work without a partner, then the following procedure should be followed:

While standing or pacing, **this is essential**, the script should then be recited aloud referring only to the cards to refresh memory. If the script cannot be recited completely by reference only to the cards, then more key words must be added to the cards until the recital can be accomplished. Once this can be done with ease, words should be gradually omitted from the cards, and the process repeated. Cards should be rewritten and condensed until there are only a few key words on the cards. Eventually, the cards will be unnecessary as the information will be committed to memory.

If the new Associate plans to work with a partner:

Both Associates prepare their own flash-cards. Taking turns, the script is recited. If Associate-1 is reciting, the other partner (Associate-2) may read aloud small portions of the script to refresh Associate-1’s memory. Both partners take turns until the entire script can be recited. Next Associate-1 gives the cue-card given Associate-2, and the script is again recited. The partner holding the cue-card (Associate-2) may read only the key-words to refresh Associate-1’s memory. This process is repeated until the entire script is committed to memory.



Sign-in Script Quantum Open House™

1 of 2

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 Open House™

2 of 2

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, (*see below) would that be OK?

** (Or) After we have seen the property, which would you prefer?*

A11



Introduction

Make sure prospect makes connection and recognizes you.

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

We met earlier today at the Quantum Open House™ 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 Open House™ 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.



**Ask For
Appointment**

*Make sure all decision
makers are present.*

When would be a good time?

How about...?

Which time...?

What time...?

How soon...?

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.



After Setting the Appointment

“I will line up properties for you to write offers on. Before we see the properties, I need for us to have an understanding. What is important to me is that you make a decision on each property we see. It doesn't matter what your decision is. It's just important to me that you make a decision so I can tell where I am with you and that I am hearing what it is you're saying with respect to finding your property. A 'No' is just as important as a 'Yes'.”

“I don't want you to feel pressured or pushed into something. I just want you to make a decision.”

“So (day) _____ when we are seeing your property, be sure to have your checkbook with you so you can write the offer on the property you choose. Again, if you don't want the home, don't write the offer. If you do want the home, be prepared to write the check right then and there.

“I will go ahead and prepare much of the paperwork on the offer and have it ready before we leave my office on (day) _____.”

