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# **The Journey To Mastery™ Managers Action Monday Manual**

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Licensor

licensee

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Its: \_\_\_\_\_

Its: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

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The Power Of Commitment Packet.p65

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# Action Monday Managers Overview

## Action Monday Overview

### I Set Up

Room set up is chevron style which may be modified to accommodate the size of the group. The room requires 2 flip charts and 3 training tables to be set as follows (please see the **diagram on page 17**).

#### 1. Trainer Table Supplies

- a. Clock
- b. Clip board
- c. Markers
- d. Calculator
- e. Jelly Beans
- f. Dictionary
- g. Handouts
- h. Water pitcher and water glass
- i. Coffee for trainer

#### 2. Supply Table Supplies

- a. Schedules
- b. Reports
- c. Sign up board for Home Tours
- d. Sign up board for any training during the week

#### 3. Water Table

- a. This table should have water and tissues only – no coffee or food allowed in a training room. There may be occasions or times that other audio video equipment is utilized and a screen may be set up behind the training table. Audio equipment, such as a microphone may be necessary in groups in excess of 100. Please verify with trainer to his/her specific preferences in this matter.

### II Good Morning

It is recommended that name tags and accountability folders are set up for each new recruit when coming on board with the program. These files will be utilized to track the attendance, contacts and production of the new agent. These files are used at all trainings or meeting with the recruit and are kept in a traveling file cabinet for the trainer(s) to monitor the progress new agents.

#### 1. File Set up

- a. A manila file folder with prongs is recommended to keep papers neat and organized and to reduce the likelihood of paper loss





## Action Monday Managers Overview

- i. The left side of the file folder is reserved for schedules – each week a new schedule is simply filed on top of the previous weeks time management, this allows both the trainer and the agent a history of time management at their fingertips
- ii. The right side of the file folder is reserved for the weekly report – again the new report is simply filed on top of the hold report putting a history of contacts and achievements at fingertips.
- iii. The permanent training nametag for each agent is attached to the outside of the folder and agents are asked to re-attach the tag at the end of each training. The files are then re-filed and ready for the next event.

### 2. Manage nametags not lists – by having

- a. 2 identical bins for file storage you may easily take attendance of your group. When the training event begins, simply remove the original bin that you brought the accountability files in and replace it with an empty bin. When the agents leave the training event, they will place their files into the new bin and the files returned will be the files of the attendees, any file not returned will simply be marked absent, you will need to double check this with the files still in the 1st bin for verification purposes.

### 3. The supply table in the registration area – this

- a. table will have whole punches to attach pages to files, schedules, reporting sheets, certified buyerforms and other forms necessary in the processing of the real estate transaction. The agents should be directed to have schedules and reports filled out prior to coming into the training room. Of course we do need to get them up to speed the first couple of weeks and someone will need to be standing by to offer assistance to any new agents.

### III Welcome – The opening of each action Monday will begin by a few

minutes of sharing wins and areas where agents feel that they need support. This is something that needs to be done to allow a free and open communication style to develop among the agent to agent relationships and the agent to trainer relationship.

#### 1. Wins –

agents take an opportunity to discuss wins be they at an open house or the bell going off in their head allowing them to see the next relevant step in their journey as real estate agents. This is something that





# Action Monday Managers Overview

corners can not be rounded on and the environment must be very uplifting and supportive encouraging everyone with an issue to add to participate.

## 2. Struggles –

this is also important, it allows the agent to see and learn from his/her fellow agent's struggles. This portion of the morning is kept very limited and the topics should have outcomes that many people can learn from and not be too individual specific.

## IV Morning Training –

the morning training is a very broad training that can help an agent, no matter their stage of development. It could be something like working on Tip analysis or working through the theory of jelly bean jar management. This should be a segment that lasts approximately 30 minutes or less.

## V Break into Teams & Clusters –

### 1. Break into Teams –

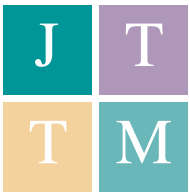
are a peer to peer feedback session with session monitors observing and adding input, the purpose of these groups is to graduate into the next section. When an individual moves through all sections, he/she should be complete with the program and be in holding for any transaction to close.

### Morning Break 15 minutes

### 2. Break into Clusters –

- a. The breakout groups are divided into 5 sections and then sub-groups may be created from the sections depending on the size of the master group
  - i. Group 0 – **New Agents** - This is specifically directed to new agents who have no appointments and have yet to complete basic skill modules to move into the next group. Focus is on scripts and orientation items.
  - ii. Group 1 – **No appointments.** This group is directed towards helping agents schedule more appointments. This group is focused on driving business to them with vehicles such as Quantum Home Tour™ their sphere of influence, getting their name out and showing that they are actively working in real estate. **Focus is on scheduling Quantum Home Tours™ and setting up Jelly Bean Jar for lead follow-up; mastering scripts! Quantum Home Tours™ are scheduled here and everyone has one!**





## Action Monday Managers Overview

- iii. Group 2 – **One to three appointments** – this group continues to look for more appointments; thus driving their business. Discussions center around networking and Quantum Home Tours™ and making sure these are scheduled and getting leads and appointments. **Focus is on scheduling and running Quantum Home Tours™; better script mastery! Run them better and make more appointments.**
- iv. Group 3 – **Less than six appointments** – this group works to raise the appointments and the focus is generally Jelly Bean Jar and following up on past leads from Quantum Home Tours™; may include scheduling another Quantum Home Tour™ or buttoning down leads to appointments. **Focus is on more appointments.**
- v. Group 4 – **Six or more Appointments** – this group works to create buyers from their appointments. **The focus is on probing and making sure the appointments are with real people.**
- vi. Group 5 – **Three or more certified buyers** – this group works to certify their buyers; looking for input on bringing their buyers to the end of the certification process and having a contract in place. Discussions are around re-certifying buyers and re-probing appointments for potential buyers that have not written contracts. **Focus in getting contracts written; they are exempt from running Quantum Home Tours™.**

VII Break

Lunch Break

VIII Triage

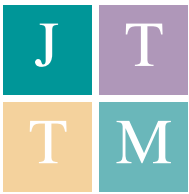
Triage is an opportunity for agents who need special coaching to receive the assistance they need. It is a hands on small group training that tackles subjects that are important in growing your business such as Appointment Making Workshop. These sessions last approximately 1 ½ to 2 hours.

Two Groups evolve after time management:

- 1) Appointment work.
- 2) Probing work.



QUANTUM  
MANAGEMENT  
SYSTEMS



# MANAGER'S HOUSE KEEPING

## ACCOUNTABILITY SCRIPT

*Start with welcome and acknowledgment, high-toned and friendly:*

“Good morning! Good to see you!

Before you go in to the training room, I have a few questions to ask you. This process is an important part of the training. It is designed to help you get full value from the program.

**1. First:** Did you make commitment to be here on time? (If question is not answered directly, be understanding and friendly, and ask question again.

If question needs to be asked three times, refer to appropriate item on foundation.

**2. Next question:** Did you keep that commitment? (Again, if questions is not answered directly, be understanding and friendly, and ask question again.)

**3. Next:** Could you have kept the commitment, make sure you receive a clear yes, this is how they take responsibility for the result of their commitment. If you do not receive a clear yes ask them again “could you have kept your commitment to be here on time?” stay with them until you receive a clear yes!

**4. Now:** What would have to happen for you to be here on time from now on?

(Support participant in identifying the relevant steps he/she could take to be on time).

**5. Good!** Will you re-commit to being here on time? (If the answer is not clear “Yes”, go back to question #3.) (When the answer is a clear “Yes”, go on to next part of script.)

**Terrific! Thank you for your commitment.**

You see, the training is designed to help you get more of what you want in your life, by making and keeping commitments. These questions weren't meant to make you feel bad or guilty, but rather to help you to get the most out of the training.

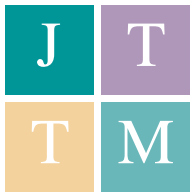
Do you feel all right about the process we went through? (If not a clear “Yes”, probe briefly and help them let go.

When the answer is a clear “Yes”, go on to next part of script.) Your not bad or wrong. Your just what? Late!

Right!







# TEAM LEADER'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	
<input type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system
<input type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)
<input type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked
<input type="checkbox"/>	<input type="checkbox"/>	Logging P I N's
<input type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs)
<input type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs)

People off of TM System

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

10 min

**Section IV Review Week**

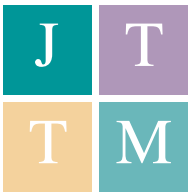
- Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file

Leadname Phone number Address Agent's name Quantum Home Tour™ name
--

- Prepare all new clients on for Buyer Certification group
- Re-Certify all Certified Buyers and prepare for Certification group

10 min





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

## Section V Analysis

*Identify to Which Group Individuals will be going*

Quantum Home Tours™ \_\_\_\_\_

Fliers passed out \_\_\_\_\_

Names & numbers collected \_\_\_\_\_

Appointments made \_\_\_\_\_

Certified Buyers \_\_\_\_\_

Assign to Cluster Group ① ② ③ ④ ⑤

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

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

*(Schedule to Triage Group)*

Names of people with no appointments

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

*Group 1*

*Work 1:1 on phone script*

People with appts but no Certified Buyers

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

*Group 2*

*Work 1:1 on Probing*

***These Sections are filled out in Cluster Groups***

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

1. Each person uses their Weekly Schedule for Monday.
2. Look at each lead & plan next step.
3. Look at each client to see what has to happen to put transaction together.
4. Verify that each individual is using appointment technology.
5. Review how to handle Quantum Home Tour™ leads.
6. Make sure appointments are showing up or need confirming calls.
7. Role making appointments.

30 min

## Section VII Taking Action

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

People needing special attention

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

5 min



**QUANTUM  
MANAGEMENT  
SYSTEMS**

**AGENT NAME:** \_\_\_\_\_  
**MENTOR :** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**SECTION I ATTENDANCE** (circle one)  
Present / Hiatus / Unexcused

- SECTION II TIME MANAGEMENT**
- Weekly Schedule
  - Tip Analysis
  - 20 Hours Prospecting
  - 6 Appointments
  - Quantum Home Tours™ Scheduled

**SECTION III ACTIVITY**

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): \_\_\_\_\_

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: \_\_\_\_\_

# WEEKLY SCHEDULE

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

**SUMMARY OF LAST WEEK:**

# of Quantum Home Tours™ \_\_\_\_\_ #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
<b>Date</b>							
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							

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

	Scheduled Open House Addresses	Date	Time
1			
2			
3			



# COMMITTED BUYER CHECKLIST

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

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

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

### PHASE ONE - BUYER INTERVIEW

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

### PHASE TWO - SHOWING PROPERTY

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

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

### PHASE 3A- SHOWING PROPERTY

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

### PHASE 3B-SHOWING PROPERTY

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

### PHASE FOUR4A - MANAGEMENT SUPPORT

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

### PHASE 4B-MANAGEMENT SUPPORT

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

### PHASE 5A

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

### PHASE 5B

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



**EXCLUSIVE CLIENT  
RELATIONSHIP AGREEMENT**

In exchange for you as an agent/broker company, working to find 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, I understand that you will provide me with available information on all properties requested by me that are obtained by: 1) seeing any other properties listed and not listed, 2) any open houses and advertisements, and, 3) property listed as "For Sale By Owner". You, as my agent/broker company, agree to represent me and my interests.

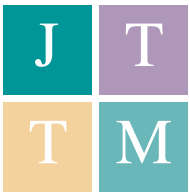
Business Cards Provided

\_\_\_\_\_  
Clients

\_\_\_\_\_  
Date

\_\_\_\_\_  
Agent

\_\_\_\_\_  
Broker



# MANAGER'S CLUSTER REPORT ANALYSIS & EXCEPTION LIST

## Section I Cluster Reports And Team Analysis

1. Review Agent Reports.
2. Identify 'no-shows" and set appointment to meet in group.
3. Identify agents who are dropping behind and schedule for Triage
4. Insure Quantum Home Tours™ and are scheduled and in place
5. Schedule agents into phone evening and insure "right" people are there.

Completed \_\_\_\_\_

## Section II Report on Action Monday™

1. Assign Quantum Home Tour™ signs and fliers.
2. Report average appointments/agent (Group 1+) probing/drop bys \_\_\_\_\_
3. Report total number of agents with 6 appointments+ \_\_\_\_\_
4. Report total number agents with Certified Buyers \_\_\_\_\_
5. Report total number of Certified Buyers in JTM™ \_\_\_\_\_
6. Report total number of agents below standard and getting notice \_\_\_\_\_

## Section III Report on Production

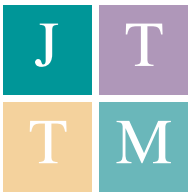
1. Report all agents with 3 Certified Buyers

_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Report all Listings Taken

_____	_____
_____	_____
_____	_____





# MANAGER'S CLUSTER REPORT ANALYSIS & EXCEPTION LIST

## Section III Report on Production (Cont'd)

### TRANSACTIONS OPENED THIS WEEK:

Property Address	Client	Price	B, S, S/B	Lender	Escrow	Title	Date Opened	Date Target

(B) Buying Agent,  
(S) Selling Agent,  
(S/B) Both

### TRANSACTIONS EXTENDED OR MODIFIED:

Property Address	Client	New Target Date	Other Changes

### TRANSACTIONS FELL OUT:

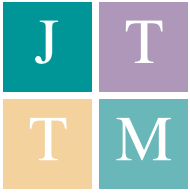
Property Address	Client	Reason for Failure

### TRANSACTIONS CLOSED:

Property Address	Client	Date Closed







# Team Report

SAMPLE TEAM LEADERS REPORT FROM TEAM MEETINGS



QUANTUM  
MANAGEMENT  
SYSTEMS



\* This is your agenda; check off \*

### TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name Ima Starr

Date 9/29/03

<b>Section I Attendance</b>		
Number of people in cluster		<u>12</u>
Number present	<u>8</u>	
Number excused	<u>2</u>	
Number no show	<u>2</u>	
Total (Must balance)		<u>12</u>
Names of no shows		
1. <u>Emma Lost</u>		
2. <u>Gonna Fishkin</u>		
3. _____		
4. _____		
5. _____		

<b>Section II Results</b>		
Number of escrows opened	<u>3</u>	
Number of escrows closed	<u>1</u>	
Number of listings taken	<u>2</u>	
People not making standard		
1. <u>Irma Looser</u>		
2. <u>Bobby Bust</u>		
3. _____		
4. _____		
5. _____		
		5 min

<b>Section III Time Management</b>		
Yes	No	<b>* Check off as addressed *</b>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Logging P I N's
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs)
People off of TM System		
1. <u>Conrad Fuzed</u>		
2. <u>Otto Control</u>		
3. <u>Clew Less</u>		
4. _____		
5. _____		
6. _____		
		10 min

<b>Section IV Review Week</b>		<b>* Check off as addressed *</b>					
<input checked="" type="checkbox"/> Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file							
<table border="1"> <tr><td>Lead name</td></tr> <tr><td>Phone number</td></tr> <tr><td>Address</td></tr> <tr><td>Agent's name</td></tr> <tr><td>Quantum Home Tour™ name</td></tr> </table>			Lead name	Phone number	Address	Agent's name	Quantum Home Tour™ name
Lead name							
Phone number							
Address							
Agent's name							
Quantum Home Tour™ name							
<input checked="" type="checkbox"/> Prepare all new clients on for Buyer Certification group							
<input checked="" type="checkbox"/> Re-Certify all <u>Certified Buyers</u> and prepare for Certification group							
		10 min					





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

\* Check off as completed \*

## Section V Analysis

Identify to Which Group Individuals will be going

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

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

- 1. Larry Lethargic
- 2. Danny Dreamer
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

(Schedule to Triage Group)

Names of people with no appointments

- 1. Danny Dont
- 2. Sally Should
- 3. Gotta Go
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

Group 1

Work 1:1 on phone script

People with appts but no Certified Buyers

- 1. Harry Hopen
- 2. Wendy Wish
- 3. Lola Like-me
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

Group 2

Work 1:1 on Probing

These Sections are filled out in Cluster Groups

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

- 1. Each person takes out Daily work planner for Monday.
- 2. Look at each lead & plan next step.
- 3. Look at each client to see what has to happen to put transaction together.
- 4. Verify that each individual is using appointment technology.
- 5. Review how to handle Quantum Home Tour™ leads.
- 6. Make sure appointments are showing up or need confirming calls.
- 7. Role play floor time appointments.

30 min

This is group activity for cluster

## Section VII Taking Action

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

People needing special attention

- 1. \_\_\_\_\_
  - 2. \_\_\_\_\_
  - 3. \_\_\_\_\_
  - 4. \_\_\_\_\_
  - 5. \_\_\_\_\_
- Names of people needing triage

5 min



QUANTUM MANAGEMENT SYSTEMS



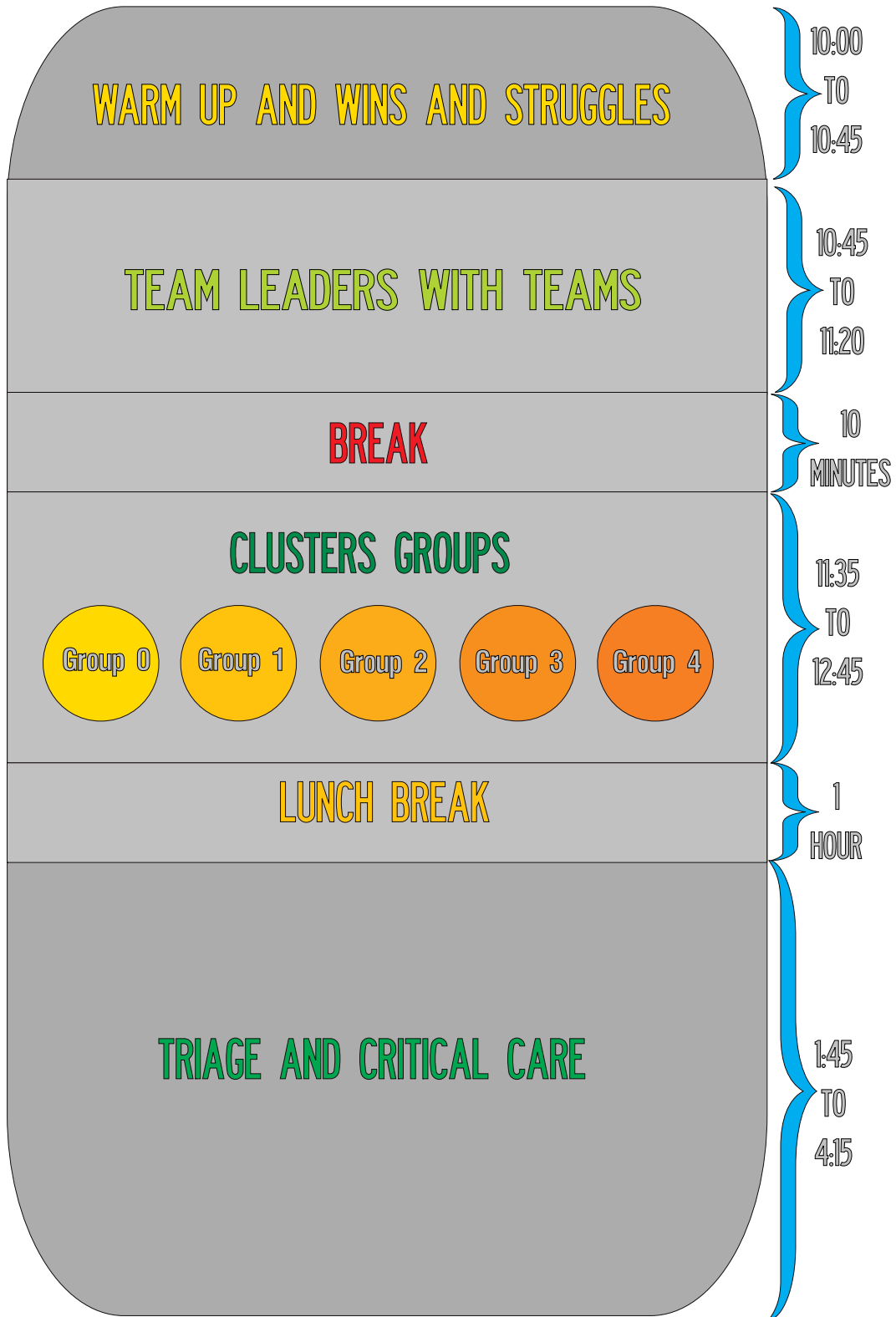
# SCHEDULE

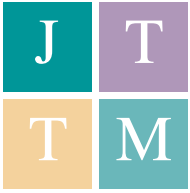
SAMPLE MANAGERS SCHEDULE OF THE DAY





# MANAGERS ACTION MONDAY TIMELINE



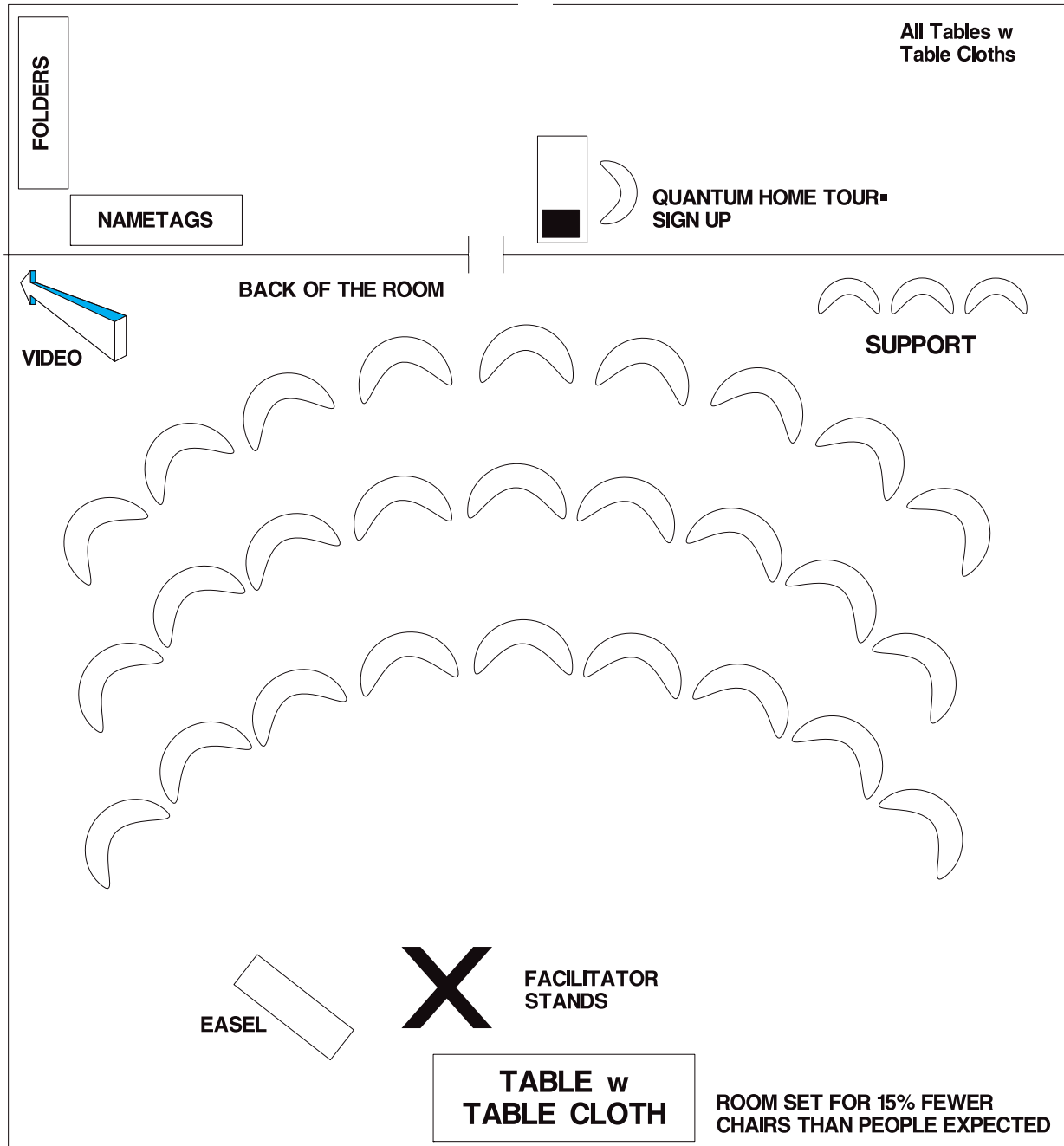


# SET-UP & SUPPLIES



# Ideal Room Setup

RESTROOMS



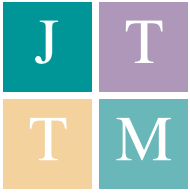


## SUPPLIES NEEDED

1. Conference room
2. Flip Chart with Paper
3. Chairs
4. Quantum Home Tour™ inventory
5. Room and Directional Signs
6. Fliers/invitations (Stock supply, write in address)
7. JTM Cluster and Agent Reports
8. Pencils
9. Clock
10. OT&M forms
11. Garbage can
12. Phone scripts
13. Air conditioning (69 degrees)
14. Kleenex
15. Weekly schedule - Certified Buyer Checklists et al
16. Clipboard
17. Training Check list, Outline and Timeline
18. Cluster paper w names from last week on wall
19. List of Quantum Home Tours™ and Open Houses available for scheduling
20. One Appointment a Day Poster, "Posted"







# 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 Home Tour™ 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





# QUANTUMHOME TOUR™ TRAINING

## PURPOSE

### MARKETING PLAN

Manager is responsible for context of Quantum Home Tour™. 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

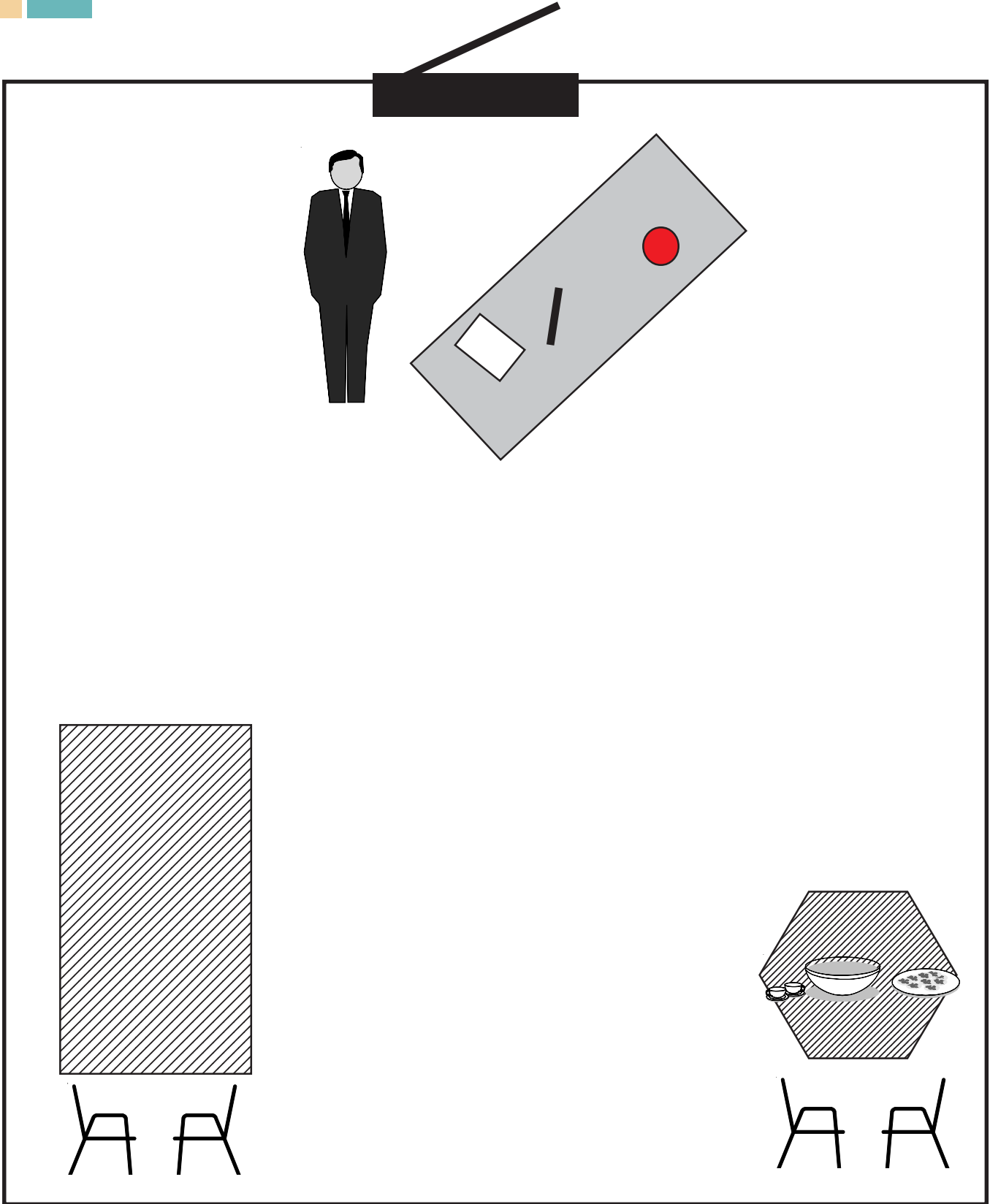
To schedule appointments with 60% of all guests who attend.

---

### SECONDARY OBJECTIVE

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







## 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 Home Tour™.

Place a **minimum of 50 Quantum Home Tour™ 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 Home Tour™ **fliers**

**Crayons, book, small children's table, chairs**

---

## AGENTS CHECK LIST

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

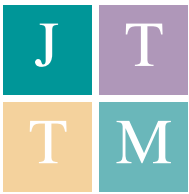
Hair, nails, shoes, etc. **immaculately groomed**

**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 QUAN-  
TUMHOME TOUR™**

Broker sets up trainees to show up at Quantum Home Tour™ 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 Home Tour™ 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 HomeTour™.

*(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 Home Tour™ 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





## **STEP TWO - AS-SIGN AREAS AROUND QUANTUM HOME TOUR™**

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

---

## **STEP THREE - CLUSTER SHOWS UP AT QUANTUM HOME TOUR™**

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 HOME TOUR™**

Take cluster into briefing room and walk them through Quantum Home Tour™ 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 - EX-CUSE 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 Home Tour™ continues until closing by alternating clusters with passing out fliers and assisting the guests.

All trainees report to ACTION MONDAY™.

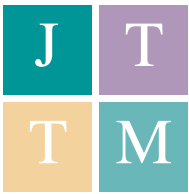




# TRAINING

## #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 BENEFITS

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  
 tion  
 Burglar alarm  
 Old Victorian

### BENEFIT

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

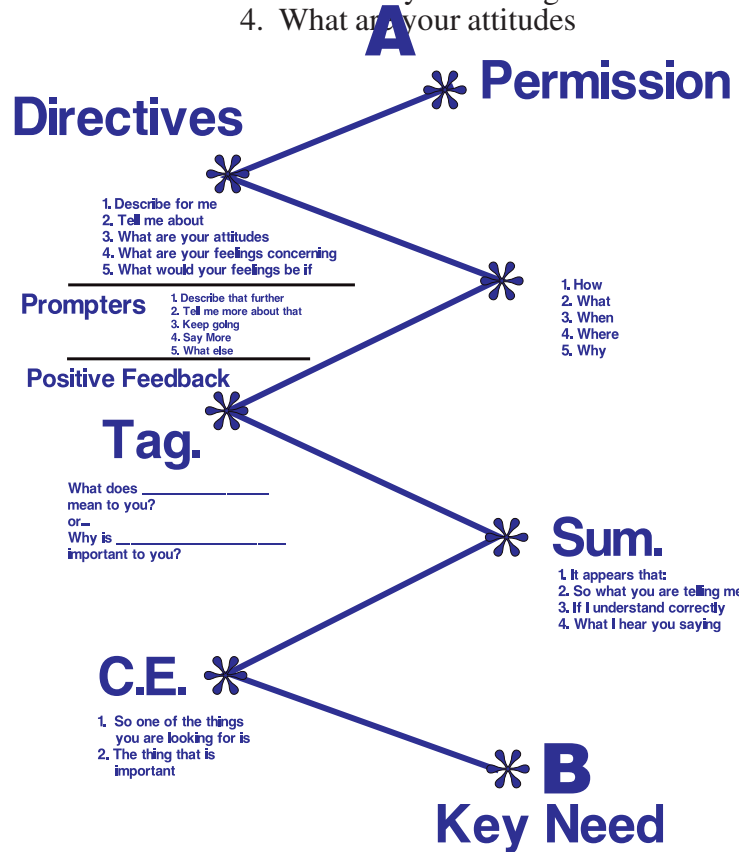
5min



**MODEL OF PROB-  
ING**

**Use of Directives**

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

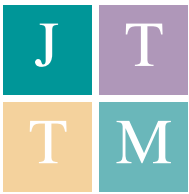


**ROLE PLAY**

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 CERTIFICATION<sup>TM</sup>

Fill out Committed Buyer Checklist<sup>TM</sup>

- 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 APPOINTMENT

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 Home Tour<sup>TM</sup> with keys. (Remember this communicates to client that we are looking for an offer to present...not looking at property.)







## AFTER SETTING THE APPOINTMENT

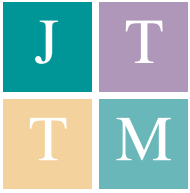
“I will line up properties for you to write offers on. Before we see the property, I need for us to have an understanding. What is important to me is that you make a decision on each property we see. It doesn't matter what your decision is, it's just important to me that you make a decision so I can 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:

$$T - (I + P) = N$$

gives you the total non-productive time.

---

### COMPUTE PERCENTAGES

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 =  $T(150) \div 15 = 10$

10 is average hours worked per day

---

### FIND AVERAGE HOURS OF N TIME PER DAY

Multiply average hours worked per day by percentage 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.

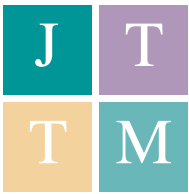
*Focus these agents on converting N time to I time, and the I time to P time.*

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

*This means they are prospecting but not converting 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.

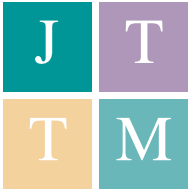
No **P** time means no money

---

## **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.





## Introduction

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

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

## Sign-In

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

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

# Pre-Survey Script Quantum Home Tour™

## 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?*

## Introduction

*Make sure prospect makes connection and recognizes you.*

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

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

## Permission

*Use experience of meeting to spring board conversation.*

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

If yes, continue.

If no, ask when you can call back.

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

(Answer questions)

## Draw Out

Tell me a little bit about your situation.

How long have you been looking?

What time frame are you looking at?

What area do you want?

## Body

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

## 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.

“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 check-book 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) \_\_\_\_\_.”

My business is referral dependent. I am putting together a small group of people who I will stay in touch with on a regular basis concerning my real estate business.

I'd like to include you in this group and what that would mean is that I'd be touching base with you once a month for a two minute phone call to ask if you know of anybody I should contact who has any needs regarding real estate. Would that be okay? I really appreciate that!

Also, in the event that you have any needs or anything that I can get from this group on your behalf, I'd be happy to pursue that as well.

## Jelly Bean Jar Protocol

1. Fixed in size
2. Personal contact every 30 days
3. Look for red ones
4. Add one - you must drop one



## First Jelly Bean Jar Call - People You Know

### Introduction

*High toned, Enthusiastic  
to talk to them, Get  
permission to talk first!*

*Go slow, make sure they  
understand what it is you  
are saying, pronounce  
every word carefully.*

Hi (\_\_\_\_\_name), this is (\_\_\_\_\_your  
name, with Prudential Preferred Properties, how are you?

Do you have a couple of minutes right now to talk?

Great, thanks...(\_\_\_\_\_name), as you probably know  
already, my business is "REFERRAL DEPENDANT". I have  
been looking at my business plan for the year 2000 and where  
I want to go with it, and I have decided to put together a small  
group of people. People that I have relationships with like you  
that I would stay in touch with on a regular basis as part of  
building my future business. And my purpose in calling is  
touch base with you and see if it would be all right to add you  
to this group. (Pause.....) What this would look like is that I  
would call you once a month just to say "Hi" and see if you  
knew of anybody I should be in touch with that has any needs  
in real estate...it would only be a couple of minutes each  
month as a phone call...? (Wait for response)

### In The Group

*Let them know you really  
appreciate them and  
their willingness to  
participate. Now give  
back something if you  
can!*

(\_\_\_\_\_name), GREAT, I really appreciate this...I promise  
I won't bother you with this and if you need anything from me,  
that would help you when I am contacting this group, I would  
love to do that. I want this to be reciprocal. For example, I  
have someone that can \_\_\_\_\_ or I have included  
someone that will \_\_\_\_\_.

### Mailing

*Let them know you will be  
mailing and offer again to  
help them.*

Also, I will be sending something out in the mail each month,  
keep and eye out for it, I would like your feedback very much.  
And please let me help you with anything you need that could  
come from the benefit of this group.

## Subsequent Jelly Bean Jar Calls

### Introduction

*High toned, Enthusiastic  
to talk to them, Get  
permission to talk first!*

### Relationship

*Go slow, make sure they  
understand what it is you  
are saying, pronounce  
every word carefully.*

*Let them know you really  
appreciate them and  
their willingness to  
participate. Now give  
back something if you  
can!*

Hi (\_\_\_\_\_name), this is (\_\_\_\_\_your  
name, with Prudential Preferred Properties, how are you?

Do you have a couple of minutes right now to talk?

Great, thanks...(\_\_\_\_\_name), This is my monthly  
follow-up call, just to touch base and see how things are  
going. (Wait....let them talk)

How are things with you?

Is there anything I can help you with or anyone in my group  
that you need anything from?

Is there anyone you know of that has any real estate needs  
that I should be in touch with?

(\_\_\_\_\_name), GREAT, I really appreciate this...I'll touch  
base with you next month, please keep me in mind, my phone  
number is on that (\_\_\_\_\_ ) I mailed to you, if some-  
thing comes up give me a call...OK?

Thanks again (\_\_\_\_\_name), Talk to you next  
month.....