TRAINING #5

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JELLY BEAN JAR TRAINING

DEFINITIONS

Green = Someone they think they will get business from or do business with.

Red = Anyone they don't wan to call again or who doesn't return calls 3 months in a row.

PREPARE LISTS

1. Have participants bring their JBJ™ count to training.
2. Identify where individuals/leads came from.
3. Create a plan of action to get more leads.
4. Verify that they have permission to call
5. Look at the schedule to call leads, schedule and make commitments.

READ HANDOUT ON "SIX DEGREES OF SEPARATION"

1. Have participants read handout.
2. Discuss with participants what it means to them.
3. Look at potential of each person in JBJ™ knowing two other people who they could refer = network of 600 actual if they stay in touch.

SCRIPTS

1. Make sure they have scripts.
2. Review how well they know scripts
3. Roll play and practice scripts

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http://www.newscientist.com/news/news.jsp?id=ns99991829

Email to test "six degrees of separation"

19:00 23 January 02
Robert Matthews

An unexpected e-mail from a US university over the coming months may not be spam - it could be from scientists investigating a fascinating social phenomenon.

According to urban folklore, everyone in the world knows everyone else via just a few intermediaries - an effect summed up by the phrase "six degrees of separation".

The number six emerged from an experiment performed in 1967 by the social psychologist Stanley Milgram, who sent packages to several hundred randomly selected people in America's Midwest, with the aim of getting them delivered to target people in Boston.

Each recipient was given some details about the target, such as their name and profession, and was asked to send the package to a personal acquaintance whom they believed was more likely to know the target personally. Milgram discovered that on average the packages reached their targets after passing through astonishingly short chains, typically comprising just six people.

Six Degrees of Separation

01-Feb-2002

The concept of "six degrees of separation," which is the idea that there are only 6 people between you and anyone you want to reach, came from an experiment performed in 1967 by social psychologist Stanley Milgram, who sent packages to several hundred randomly selected people in the Midwest, with the aim of getting them delivered to target people in Boston.

Each recipient was given some details about the target recipient, such as their name and profession, and was asked to send the package to a personal acquaintance they believed was more likely to know the target personally. Milgram discovered that on average the packages reached their targets after passing through only about six people. In 1998, mathematicians Duncan Watts and Steven Strogatz at Cornell University showed that Milgram's finding can be explained by the "small world effect," in which just a few people with many different friends can quickly network through otherwise huge networks of acquaintances.

Attempts to replicate Milgram's findings have had mixed results, and even the original experiment didn't prove that the "six degrees" effect holds true for areas outside the U.S.

Now Watts and a team of researchers at Columbia University are now using the internet for a global version of the experiment. They are sending out e-mails that ask people to use their network of acquaintances to get an e-mail message to targets spread across the world. According to Watts, e- mail is ideal for testing Milgram's claim, since there are over 100 million e-mail users worldwide.

Only e-mails between genuine acquaintances will be counted as completing a chain. People will not be allowed to take a short cut by just looking up the target's e-mail address.

Watts has set up a website giving details about how to take part, and how to volunteer to act as a target. "Ideally, we'd like to have, say, 100,000 people, each trying to reach around 20 targets," he says. The team wants as many people take part as possible, because they suspect people's dislike of spam might otherwise ruin their experiment. Early tests show that only one in four e-mails are being passed on, so many thousands of people will have to take part for even one chain of acquaintances to reach the target.

So scan your spam carefully, before you push the "delete" button. "Perhaps people can't be bothered to pass them on — or perhaps Milgram was just wrong," says Watts. "Either way, we need lots of people to take part so we can tell."

Small world

In 1998, mathematicians Duncan Watts and Steven Strogatz at Cornell University showed that Milgram's finding can be explained by the "small world effect", in which just a handful of people with very diverse friends can "short circuit" otherwise huge networks of acquaintances.

But attempts to replicate Milgram's findings have had mixed results - and in any case, the original experiment fell far short of proving that the "six degrees" effect holds true for the whole world. So a team at Columbia University is now using the internet to attempt a global version.

Instead of a postal package, they are inviting people to use their network of acquaintances to get an e-mail message to targets spread across the world. According to Watts, who devised the experiment, e-mail is ideal for testing Milgram's claim as there are well over 100 million e-mail users worldwide.

Only e-mails between genuine acquaintances will be deemed to complete a chain. People will not be allowed to short-circuit the sequence by just looking up the target's e-mail address.

Chain mail

Watts has set up a website giving details about how to take part, and how to volunteer to act as a target. “Ideally, we’d like to have, say, 100,000 people, each trying to reach around 20 targets,” he says.

The team is keen to have as many people take part as possible, not least because they suspect people’s mistrust of unsolicited e-mail might otherwise scupper their experiment.

Early tests show that barely one in four e-mails are being passed on. With such a high rate of attrition, many thousands of people would have to take part to give much chance of even one chain of acquaintances reaching the target if Milgram’s six degrees apply worldwide.

“Perhaps people can’t be bothered to pass them on - or perhaps Milgram was just wrong,” says Watts. “Either way, we need lots of people to take part so we can tell.”

Why Math is Amazing

07-Sep-2005

Many of us non-mathematicians are intrigued by the movie "Proof," the TV show "Numbers" and the book "Freakenomics," even though we don't fully understand how math problems are solved. Now University of Massachusetts researchers have invented a new algorithm which solves the problem that has puzzled mathematicians for years: how does "six degrees of separation" work? This is the theory, made into a play and then a movie of the same name, that says that there are only 6 people between yourself and anyone in the world you want to make contact with.

First of all, what is an algorithm? Wikipedia.com defines it as a set of well-defined instructions for accomplishing some task which will result in the solution to a problem. A simple example of an algorithm is a recipe for making a cake. If you measure all the ingredients correctly and mix them in the right order, then bake the result at a specific temperature for a specific amount of time, you will end up with a cake.

The idea of six degrees of separation started in the 1960s with two psychologists who devised a plan: People in Omaha, Nebraska were asked to deliver a letter to a target person in Boston via an unconventional route: the message had to be passed through a chain of acquaintances. The people starting the chain had only some basic information about the target individual—including name, age and occupation—and were asked to forward the letter to someone they knew on a first- name basis in an effort to deliver it through as few intermediaries as possible. None of the people who initially sent the letter knew the target individual. Of the letters that reached the target, the median number of people in the message-passing chain was six.

Computer scientists Özgür Simsek and David Jensen were inspired by this research. "What came out of that study was that we are all connected," says Simsek. But the findings also raised a number of questions about HOW we are connected. What are the properties of these networks and how do people efficiently navigate them?

Participants in the study who efficiently sent the message probably acted intuitively by combining two human traits that apply to computerized network-searching as well: People tend to associate with people who are like themselves. Bostonians often know other Bostonians, and the same holds true for qualities such as age or occupation. The second important characteristic of these networks is that some people are more gregarious and have many more acquaintances than others. These people act as hubs, bringing many different people together with one another.

The algorithm that gets a message to the target person most efficiently passes it first to one of these gregarious individuals with a wide circle of friends, since some of them are likely to be similar to the target. Simsek says, "In this case, one plus one is more than two."

Jelly Bean Jar Permission Script

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

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

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

Jelly Bean Jar Protocol

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

First Jelly Bean Jar Call - People You Know

Introduction

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

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

Hi (_____name), this is (_____your name, with ____Company Name_____, how are you?

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

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

In The Group

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

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

Mailing

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

Also, I will be sending something out in the mail each month, keep 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!

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)

Relationship

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

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?

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'll touch base with you next month, please keep me in mind, my phone number is on that (_____) I mailed to you, if something comes up give me a call...OK?

Thanks again (_____name), Talk to you next month.....

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This could easily be two workshops or one long one.

Purpose:

Often we lose track of the meaning and value of the Jelly Bean Jar. We, as managers and trainers, begin to look at the immediate picture: Where is the very next deal coming from?

Our charges, the JTM members are naturally looking there. They want to get paid before they go broke. The want to graduate and get out of the program and on with their lives. Problem is, that is "Real Estate as Usual- 101"

Of course we want to get the deals done, and sooner than later. But if we lose sight of the long-term benefits of the JTM program, we let it devolve back in the swamp of REaU-101. The thing we can give the JTM members for life is the Jelly Bean Jar that provides business ad infinitum.

Step one:
See where they are in the development of Jelly Beans and the quality of them.

On the flip chart, draw 5 lines/6 columns vertically like this:

JTM Name	Total # JB's	From QHT's	Prospect	45 Days Buy/List	JTM Time/Mo
MB	160	40	10	3	5
BG	47	6	1	0	1
BH	200	50	15	4	6
Etc.					

Ask each person to estimate the total number of Jelly Beans, How many of them *walked into a QHT*™ (meaning not from permission gathering, SOI, the

TRAINER NOTES

PTA) They parked their car, walked to the door, signed in and had a tour, whether or not they gave you an appointment.

Talk about the fact that the QHT™ people (and Floor calls) have made a definite move to indicate they have something going on in their heads about real estate. The statistics tell us that ___?__ (82%) of them are going to buy or sell within ____?_____ (9 months.)

Choose the best, fullest, highest number of jelly beans to do this math:

Draw on the Flip Chart:

There are 200 total JBs

QHT (above the line)

40 JB
X 60% (Real buyers and sellers. We're being pessimistic)
X 50% (The ones that will work with you)

= __?__

12 Transaction (trick: 50% x 60% is 30%; so use 30% of JBs)

40 calls/month X 5 minutes/call X 12 months = ___?__ (2400 mi)

2400 minutes **40 hours** (divide by 60 min/hour)

For 12 deals ➡ 3:20 hours to get TO the deal, not to complete it.

(Another math trick: It is going to equal the # of QHT JB because 5x12=60 then you divide by 60.

Meaning that every JB is one HOUR per year!!)

Everything Else
160 JB
X 10% (Real; we're being optimistic!)
X 50% (your share)
=__?__
8 Transactions

160 calls/month X 5 min/call X 12 month = __?__ (9600 minutes)
9600 minutes = **160 Hours**
For 8 deals ➡ 20 hours to get **to** the deal.

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So what is your job as you call your JB's?

(Find the red ones quickly and efficiently, stop trying to turn sand into gold.)

Remember, you do not have to lose the red one forever, you can just include them in your SOI or other contact list.

The flip chart is everyone on the planet (not to scale)

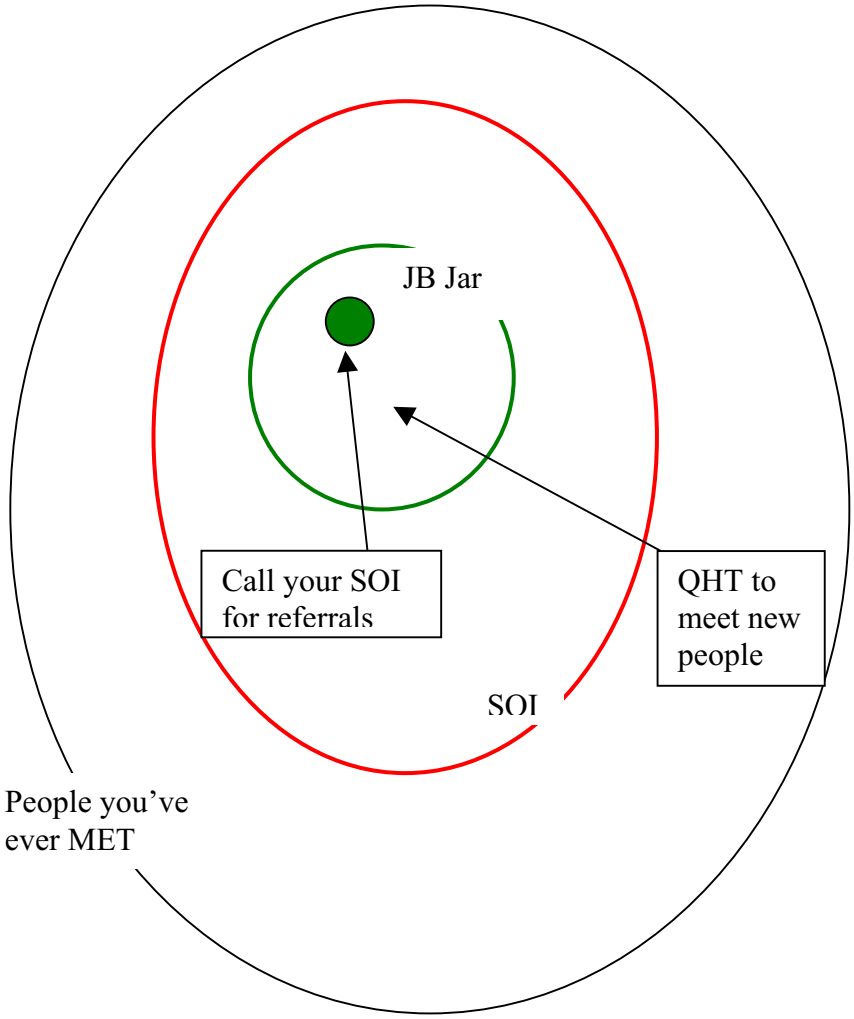
Outside circle are people you've met somewhere. May not know your name.

SOI (Red) is your sphere of Influence. These people know your name.

JB Jar are your best. These are the people you think are going to buy/sell w/in 9 months AND you have talked to them in the last 30 days. Green dot is your referral sources (Raving Fans)

You get JBs from your SOI and QHT.

You MAIL only to your SOI. It will grow over time as you drop out jelly beans from the Jar into SOI. You mail to this group to keep reminding them how you work hard. This insures you will get the "accidental" business from your family, friends and SOI.



That's looking "down" at the Jelly Bean Jar. Let's look at it over a timeline.

This is just a part of a Jelly Bean Jar analysis we did in San Jose:
We asked Brian Sheumaker to guesstimate when he thought his JBs were going to mature and do something. He put that into his Jelly Bean Jar database and exported it to Excel spreadsheet. Then we calculated the days to maturity and graphed it.

What you see here is a snapshot of what his business timeline looks like for nearly the next year. Who to expect in 30 days, 60 days, 90 days, etc.

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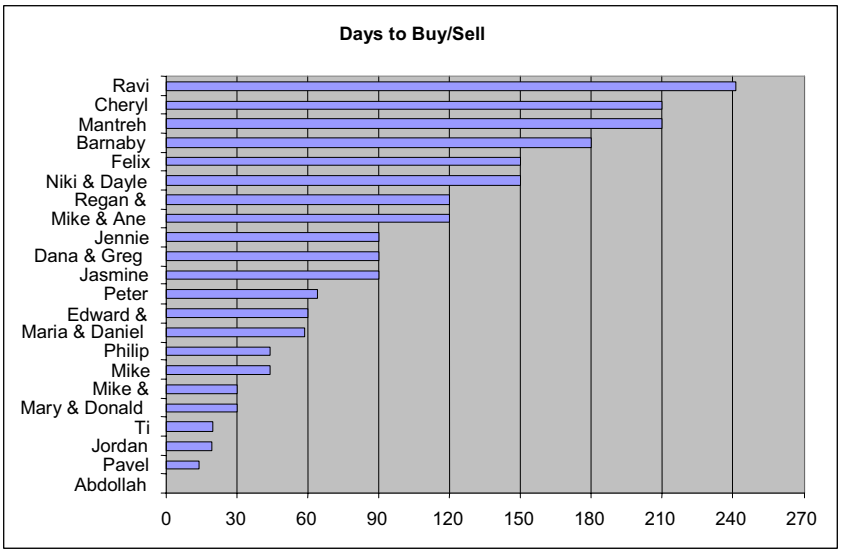
Another Look at Your Jelly Beans – JTM Workshop

Now some if not all of the JBs may move forward, but he can see what his future looks like. He can "see around corners"



Here is another way to look at the results from the Jelly Bean Jar activity:

# Calls (JB)	% Real (Green)	% Yours	# Deals
200→	20%	20%	8
200→	50%	20%	20
200→	50%	50%	50
200→	60%	60%	72

What this means is that you start out with the same basic results as if you did not do the Jelly Bean Jar.

1. As you continue to call them, %Yours increases.
2. As you drop red and add green, the %Real increases.

The number of actual calls remains the same. Because both results increase at the same time, the increase in results is dramatic.

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Purpose:

The whole purpose of having and building a Jelly Bean Jar is to have future business waiting for you when the future shows up. The only way to have that be so is to keep in relationship with your JBs over time. There are a thousands reasons why not to do it. Remember: it is ALWAYS fear-based behavior. Our purpose with this workshop it to uncover the fear.

NOTE: It is a good workshop to do before a Jelly Bean Jar call-session. Make sure everyone brings their Jelly Bean Jar list and has made a commitment to calling for at least an hour afterwards.

Begin:

Write on the flipchart the reasons they have not made the calls they need this week. Each week, they need to call 25% of their Jelly Bean Jar. You might write down the Number of JBs in one column and the reasons why they didn't call in the other. You will use the reasons why not later.

Go to the other flipchart.

Point A to Point B

Draw the picture as you go.

Remember this is interactive. Don't write the words on the chart until they give it to you.

A is what you _____ (have) and B is what you _____ (want)

On the way from A to B, you encounter an _____ (obstacle) along the way.

At the obstacle you are required to make a _____ (decision) Yes or No. You must decide to _____ (pay the price.) [A decision, not a choice. Decision is binary.]

If the answer is Yes…you continue along the way to B. If the answer is No, then you immediately create the _____ (reasons why not.) These reasons are

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reasonable, sensible, rational and logical. Thus they are called reasons. They are why doing what is not in your best interests seems right.

They are always based on _____ (fear.) Any choice to do what is not in your own best interest is always based on fear.

So on your way to B (what you want) you end up at C _____ (something else.)

Until you uncover and confront the lie that is in the reasons, you will remain at C until it becomes "failure" in the dictionary sense. You will fail out of the business into something else.

If there is fear in the decision and the reasons are not the truth, then you have given away power over your outcome up to fear. You cannot change your outcome until you uncover and change the lie that is at the root of your reasons.

Power comes from _____ (telling the TRUTH)

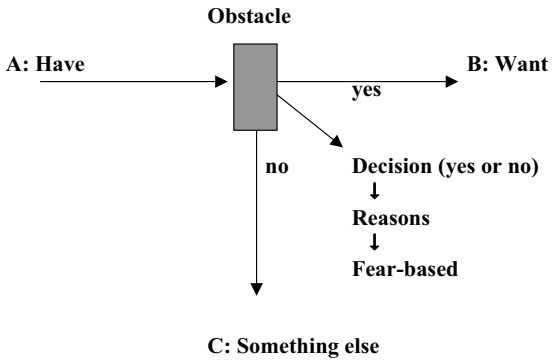
What you resist, you are stuck with. If you resist the truth and cling to the reasons, you are stuck with your "something else."

Now go back to the other chart and choose just one very reasonable reason and debrief it.

If you can, choose one that looks like Either/Or thinking. "My kids were sick, the baby sitter quit." That's the Mommy syndrome. If you can get someone to work through that, you can really make a difference.

Just do two or three.

If you have time (don't let this go over an hour) Put hem in twos and let them debrief their reasons.



TRAINING #14

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Background:
It is a lot of hard work acquiring your Jelly Beans! You spend hours:

- printing up and passing out invitations
- getting sign permissions
- putting up signs
- taking down signs
- building relationships, and
- making and keeping appointments.

When there are only a few Jelly Beans in your Jelly Bean Jar, managing them is simple. But, your Jelly Bean Jar can become very unmanageable, confusing, and frustrating, if you don't have a good system set up from the beginning.

Juggling:
We are, in effect, jugglers. Anyone can "juggle" one or two objects in their hands – you don't need any training, or foundation, for this task. But the lack of training (foundation) becomes apparent very quickly when just one or two more objects are added into the juggling act. However, someone who has trained and knows the proper techniques can add a number of objects and handle them effortlessly.

If we don't have an efficient method of handling our Jelly Bean Jars, you will lose some of your hard-earned Jelly Beans – simply because they "fall through the cracks".

Who Can Benefit From This Training:
Everyone. Even if you're using another database, or contact management system (ACT, Top Producer, Goldmine, etc), there's bound to be "foundational" items here that can be applied to other systems.

Let's Begin…

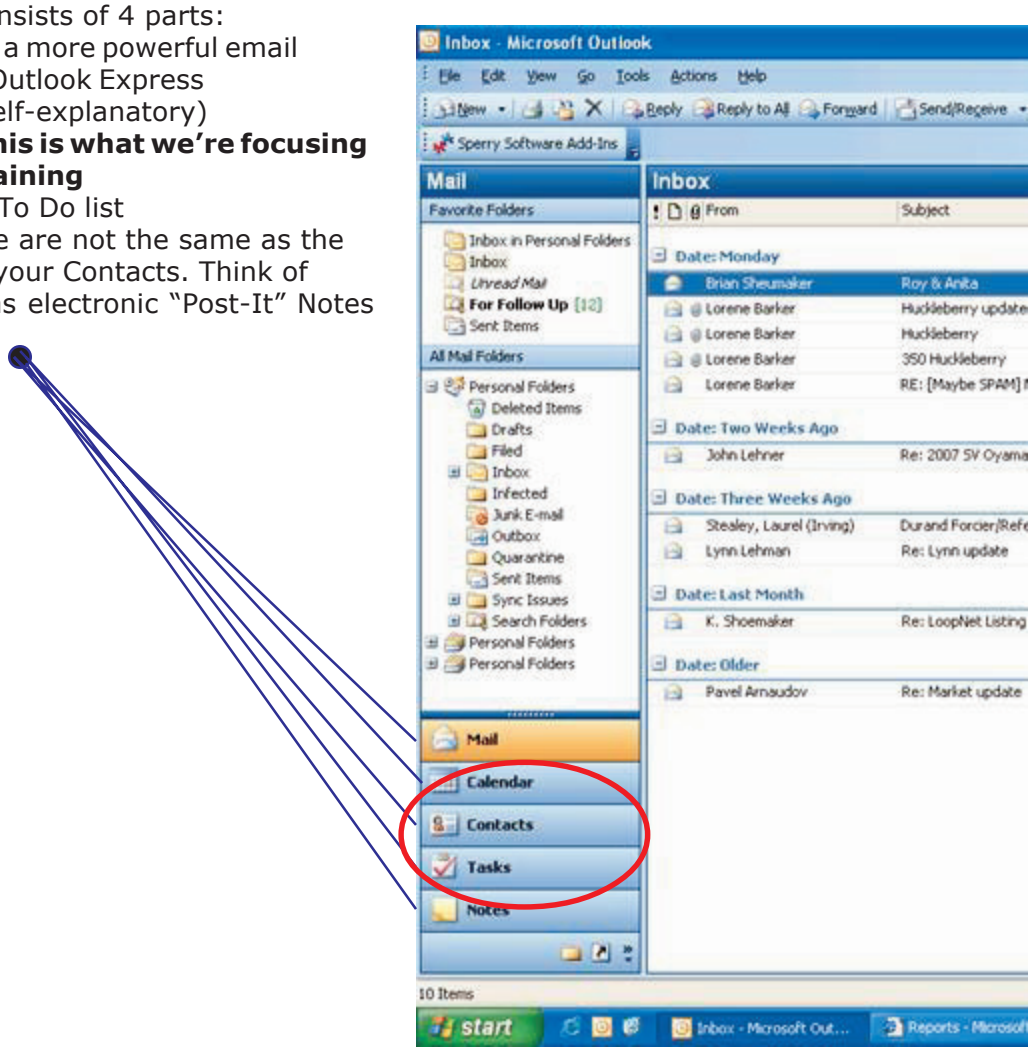
Key Things To Remember:

1. If you haven't selected a contact management system yet, and you have Outlook on your computer – use it.
    a. It's the most widely-used system, and you can transfer (export) your data to something else later if you need to.
    b. If you don't have Outlook, or any other system, Outlook is probably a good choice to invest in
2. You *will* need to *invest* some time entering your new contacts into your Jelly Bean Jar.
    a. Notice the word "invest" – you will be paid back in time saved by doing this early on.

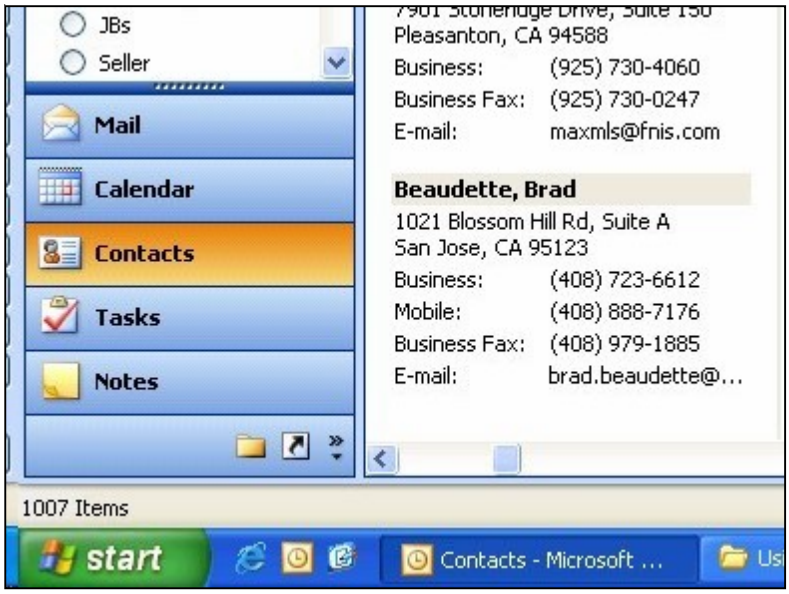
What is Outlook?

Microsoft Outlook consists of 4 parts:

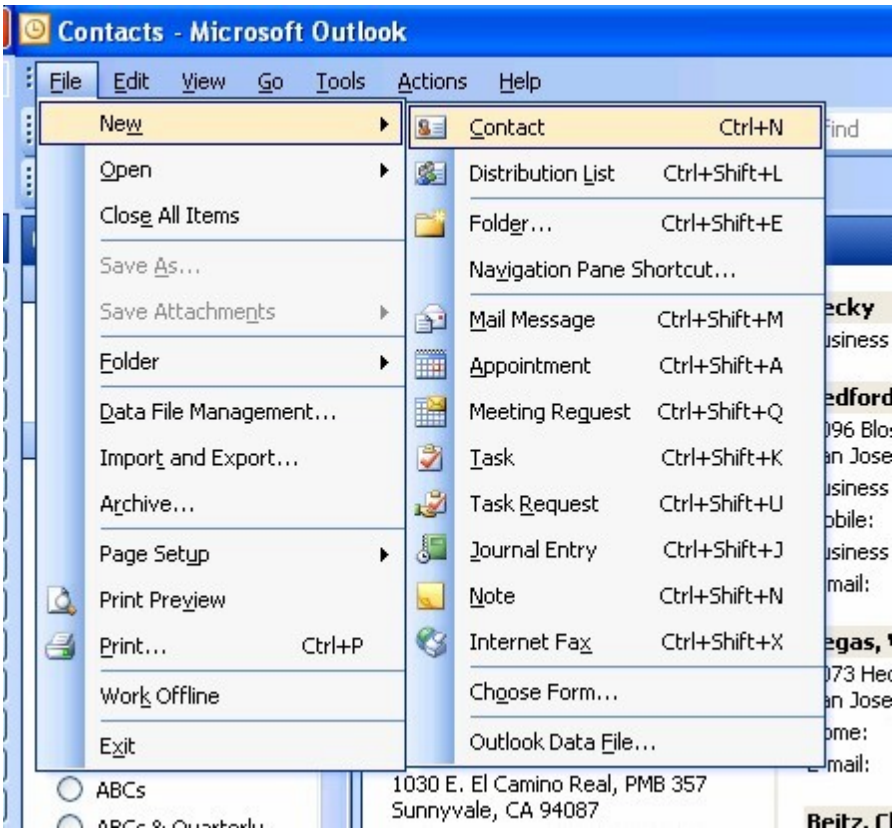
1. Email – this is a more powerful email system than Outlook Express
2. Calendar – (self-explanatory)
3. **Contacts – this is what we're focusing on for this training**
4. Tasks – your To Do list
5. Notes – These are not the same as the Notes within your Contacts. Think of these notes as electronic "Post-It" Notes



Select Contacts & your contacts appear on the main screen. Typically like the image below. If you have an earlier version of Outlook, the sidebar will not be there, you will need to follow the "select" directions

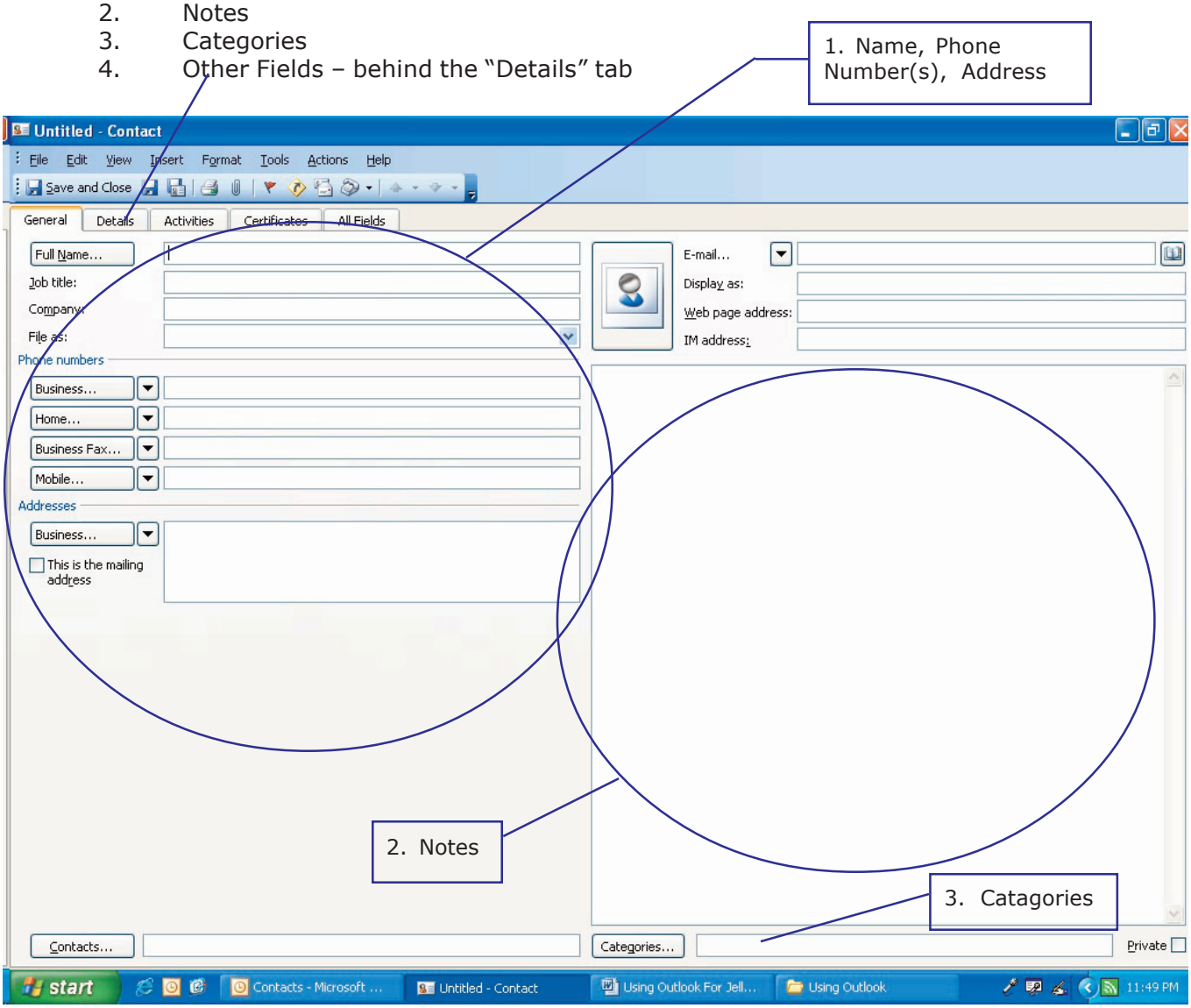


Next, either double-click a contact you want to change, or select File / New / Contact to create a new contact. You can also click the "New" button at the top left corner of your screen (may be different on your computer).



There are four general areas of Outlook Contacts that we'll want to fill in:

1. Name, Phone Number(s), Address
2. Notes
3. Categories
4. Other Fields – behind the "Details" tab

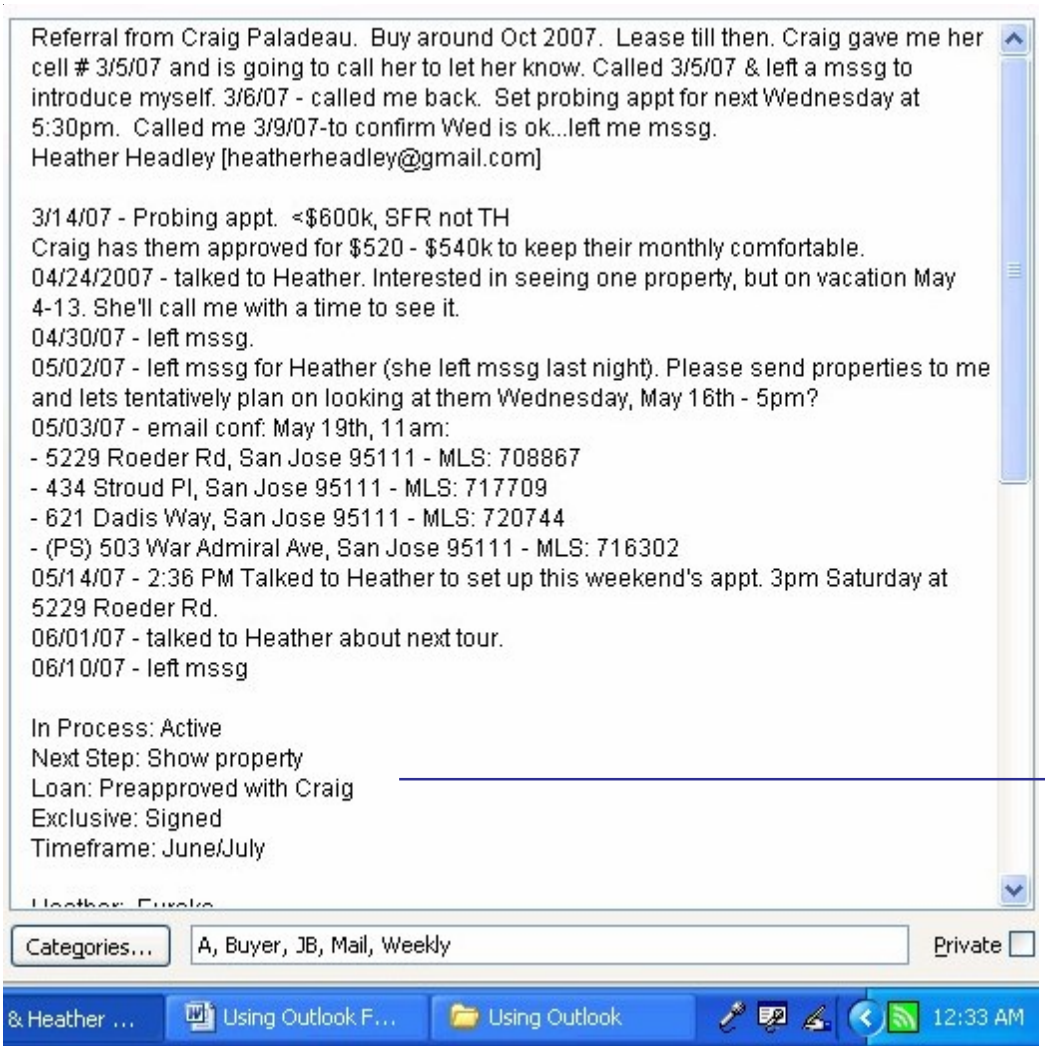


Name, Phone Number(s), Address

1. Be consistent in your formatting (i.e. (408) 999-9999, or 408-999-999, etc)
2. Be sure to put the address in the correct address field (Home, Business, Other – default is Business, but we will generally have Home addresses)
3. Be careful not to add any extra characters (spaces, etc) – particularly, before the information. This can mess up sorting later.

Notes

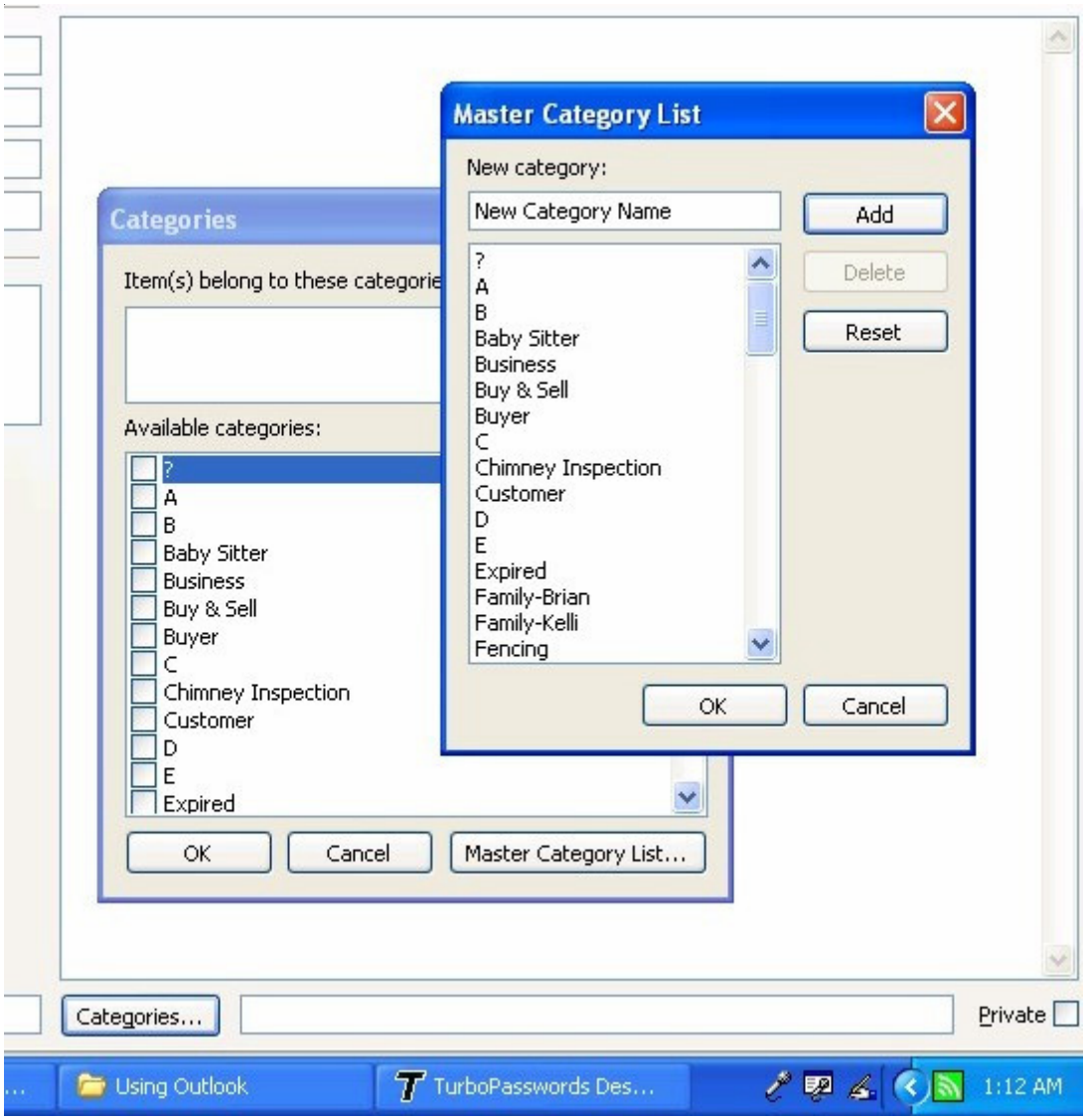
1. Put in everything you can think of right after you first meet the Jelly Bean. This will help you remember them, their likes & dislikes, etc, when you're keeping track of 199 other people as well!
2. Whenever you talk with them, mail them a personal note, leave them a message, meet with them, etc – make note of it in your Notes field.
3. Always, always, always start each note with the date. This makes a great contact log & makes it easy to check information.
   a. **TIP:** When you're making lots of calls & appointments entering the date all the time can be a pain. I bought a little software add-on for Outlook from Sperry Software that automatically adds today's date when I do a certain key combination. This also ensures I enter the date in the same format every time. It cost $14.95, and is available as a download from:
      http://www.sperrysoftware.com/Outlook/Insert-Date-Time.asp
4. You can also have a pre-made template for specific information like the bottom of this note log. Keep it in Outlook **Notes** so you always have it.



Categories:

1. This is what makes Outlook so powerful. Once you have your Jelly Beans in your Outlook Contacts, you'll be able to pull them up in a variety of ways.
    a. Are you going to do drop offs in an area of town you did your 5th Quantum Home Tour™ in? Pull up your Jelly Beans from QHT5, then you can print out the list and you have all the addresses in your hand.
    b. Do you just want a list of all your Jelly Beans? Perhaps to make your calls? Pull them up by the JB category and they're all there.
2. Suggested Categories (I prefer to use shorter names, "QHT1", rather than "Quantum Home Tour™ #1")
    a. JB – this contact is a Jelly Bean
    b. QHT1, QHT2, …which Quantum Home Tour™ I met them at, or door-knocked for. Some Jelly Beans are in multiple Quantum Home Tours.
    c. Weekly or Monthly – If they're doing something sooner than later, I categorize them as Weekly contact. If their timeframe is further out, they're a Monthly contact. This is helpful for determining your Hot Jelly Beans.
    d. Buyer
    e. Seller
    f. Buy & Sell – if they're going to do both
    g. A, B, C or D – completely subjective ranking depending on how serious they are, how soon they intend to do something, and how confident I am that they are "mine".
    h. Visitor / SignPerm or, Walking – I think we need to add these. If they walked into a QHT, they're a Visitor. If we met them door knocking, they are "SignPerm", or maybe "Walking" – I think I'll use "Walking". They may be both, and that's okay.
    i. Mail – this is relatively new for me. Everyone on my monthly mailing will be assigned to this category. I used to mail to all of my A, B, and C people, and my JBs, but it will be easier to just pull up "Mail" and do a mail merge. Alternatively, you can set up a "View" that pulls up all the desired categories.

3. You can create as many categories as you want and also delete the built-in ones you don't want.
    a. Click on Categories button at the bottom of the Contact page
    b. In the pop-up, click on Master Category List
    c. In the next pop-up, type in the new category exactly as you want it, and click on Add.
    d. Click on OK, and your new category will be in the Categories list for you to select/deselect.



e. TIP1: When assigning categories to a contact, you can pull up the Categories list (as we just did, above), and select/deselect the desired checkboxes. Or, you can just type the Category name (exactly) in the Categories field for your contact. If there's already Categories in the field and you want to add a new one, just put a comma at the end of the list of Categories, then a space, then type in the name of the category.

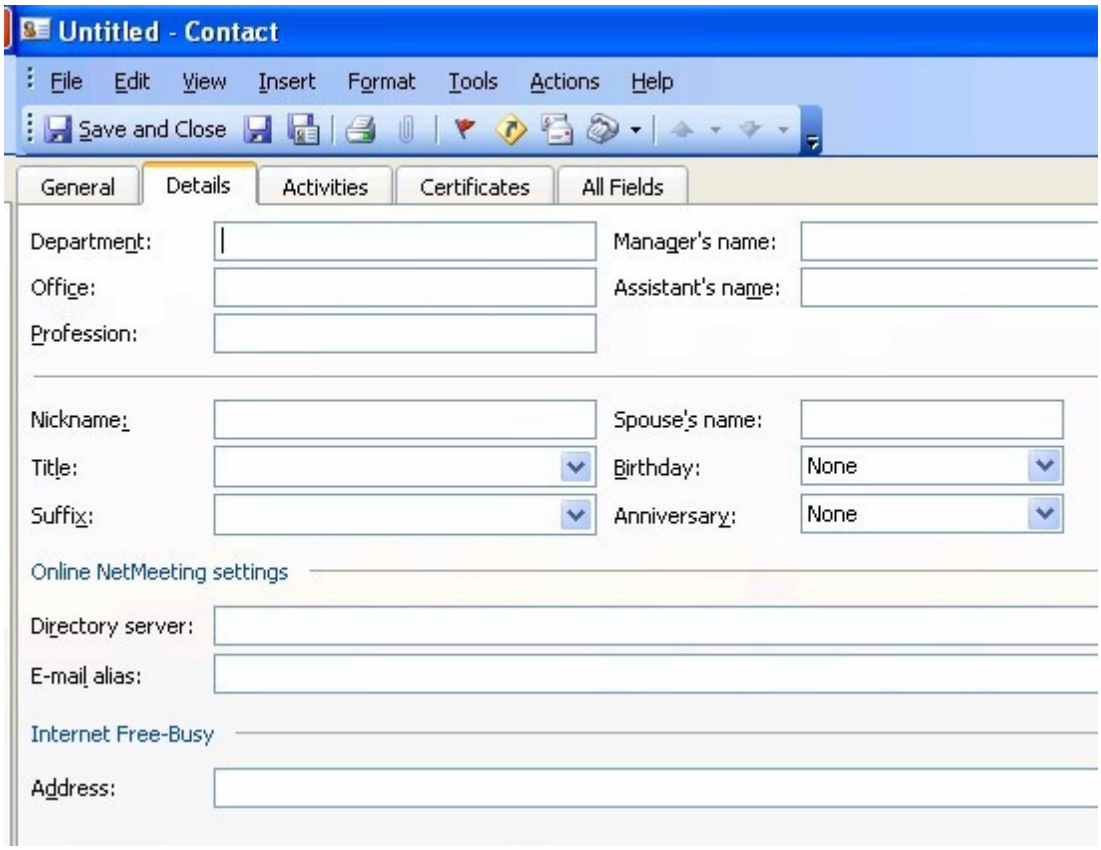
f. For instance, if the contact already has: "A, Buyer, JB, QHT6, Visitor", and they've just walked into your 8th QHT, type in ", QHT8" at the end of the list, and that's one of their categories. Just be sure the category is in your Master Category List.
g. **TIP2:** When you have a long list of Categories and you pull up the Categories list, just type the first letter of the Category you want, and the list will go right to that letter.
h. **TIP3:** If you name your categories _CatName, the underscore will force it to the top of the list.

The Details Tab:

1. We get a little creative here, and use these fields to track information that's not listed in this tab. You'll need to keep track of what each of the fields used is really tracking.
2. Tracking your last contact with the Jelly Bean:
   a. This is the section I use to track when I last contacted my Jelly Beans. There is a Follow Up function built into Outlook, but I've found the pop-ups associated with it annoying, and it doesn't work for me personally.
   b. **Assistant's Name Field** - I use the Assistant's Name field to track the date I last contacted my Jelly Beans. One of the reasons I picked this field is that it's one of the fields that synchs with my Treo cell phone. Therefore, all of my data is available right on my phone.
   c. Using the Sperry Software add-in, I can just click in the Assistant's Name field and put today's date instantly in the field. And since the formatting is always the same, it can be effectively sorted when I look at all my Jelly Beans at once.
   d. **Note:** You could use any of the fields you want in the details tab, just avoid the Birthday and Anniversary fields

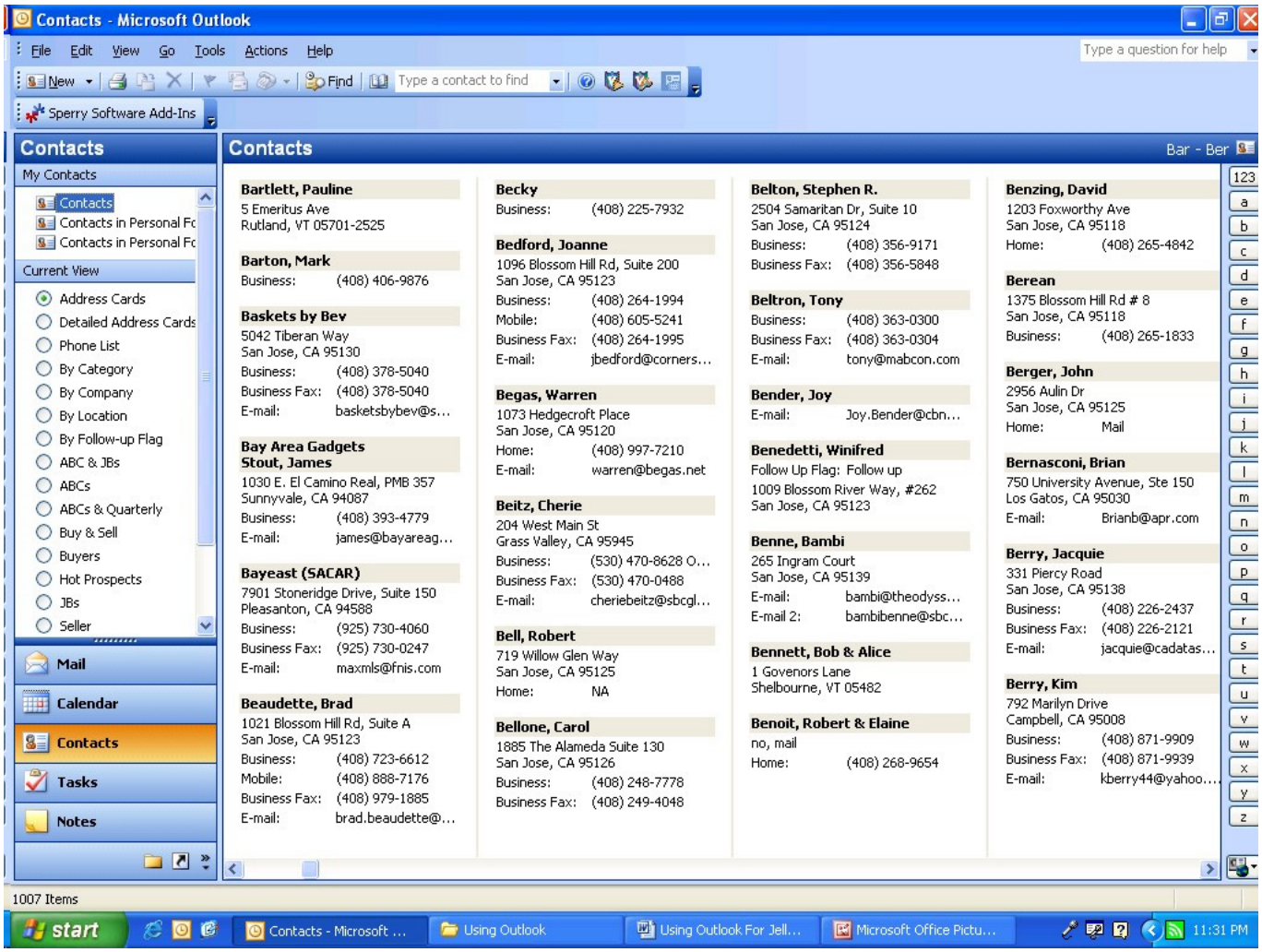
      Be extremely careful about using the Birthday and Anniversary fields. These fields automatically create a *recurring* annual appointment in your Calendar for whatever date you assign. And, even if you change these dates, the original recurring appointment remains! These recurring events show up at the top of the Calendar, which actually pushes your Calendar down on the screen, and makes it very difficult to see.
3. Tracking your Jelly Bean's "Action" Date:
   a. You can select one of the other fields to track when you believe your Jelly Bean will buy/sell
4. Tracking your Jelly Bean's "Met" Date:
   a. It's advisable to use one of the other fields in the Details tab to track the "Met" date – when you met this Jelly Bean.

1. By tracking this information, you'll be able to pull up a list of your Jelly Beans according to:
    a. When you last called them/who needs to be called.
        i. **TIP2:** This is also handy for tracking the number of JBs contacted that week for your weekly report. Just sort by date contacted and count the ones contacted that week.
    b. Who's the hottest Jelly Beans – those whose Action date is coming up soonest. You'll want to add them to your Weekly category.
    c. Track the "incubation" time of your Jelly Beans – from date met to action date.



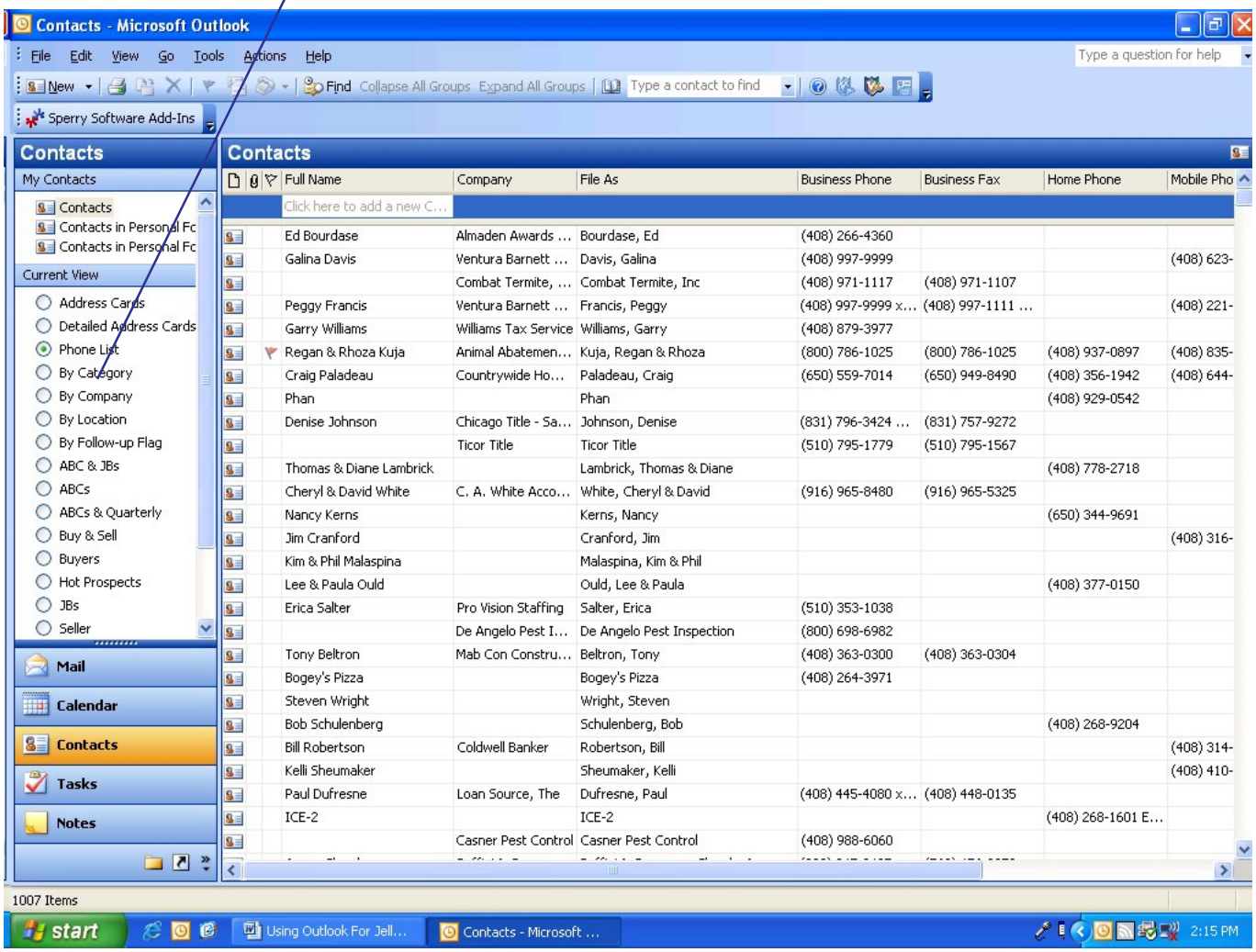
Using all of this information

When you first pull up your contacts, it probably looks like this: This is the default 2003 contacts. You can go directly to the name by clicking on the letter on the right.



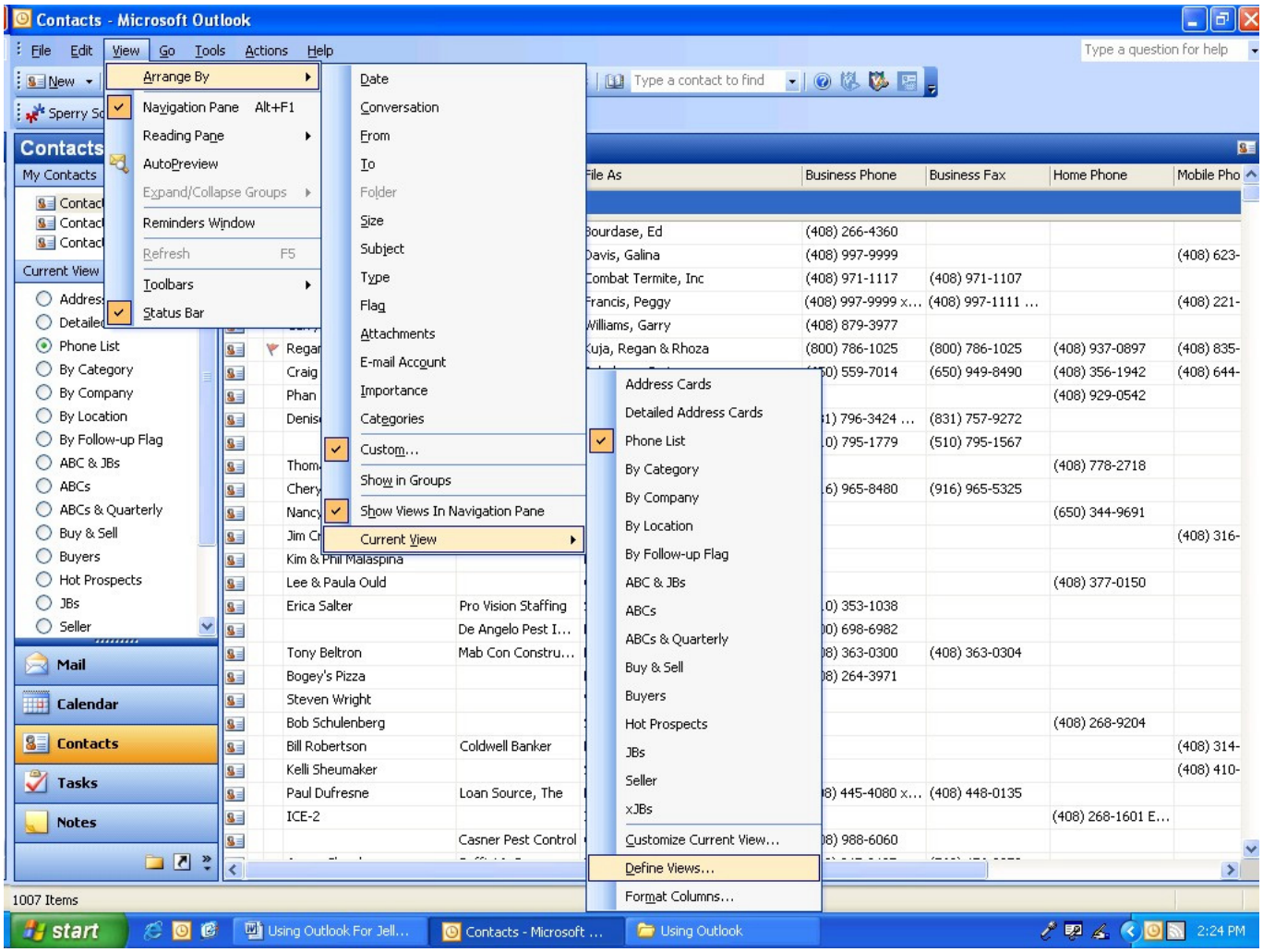
Create a new View to easily see your Jelly Beans:

1. Click on the Phone List view to see your contacts like this:



Many of the Current Views in the list on the right are created ones.

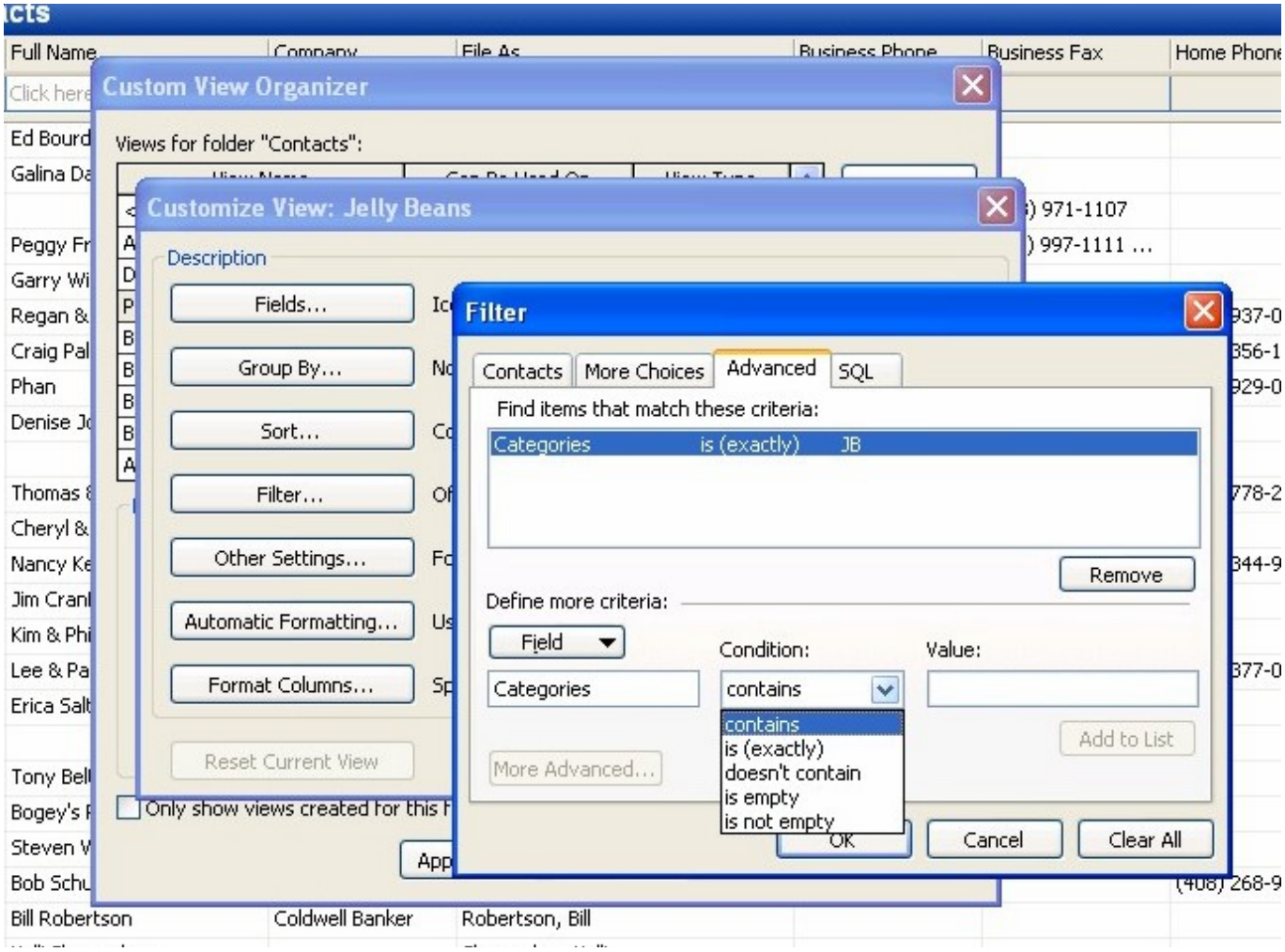
2. Copy and rename the view:
   a. This ability is "buried" deep in the menus, but it is available. Go to View / Arrange By / Current View / Define Views.



   b. The Custom View Organizer comes up. Select the view you want to copy, and click Copy.
   c. In the pop-up window, **type a new name** for your View and click OK.

d. The Customize View pop-up appears. Here you can specify how the new view appears and what information it shows.
    1. Click on Filter, and then the Advanced tab.
    2. Here's where we're going to specify that we only want our Jelly Beans displayed.
    3. Under the Field button, type in "Categories"
    4. Under Condition, select, "is (exactly)"
    5. Under Value, type in "JB"
    6. Click the "Add to List" button to add this condition to your View.

    You can add more conditions to this or future lists to further refine who/ what is displayed.



7. **Note**: Conditions are handled as a logical "OR". For instance, if you Filter by "JB" and "Weekly", all the contacts categorized as either "JB" OR "Weekly" are displayed.
8. **Note**: be careful of the "contains" Condition. Both categories, "B" and "Buyer" *contain* the letter "B". If you want to pull up the category "B", use the condition "is (exactly)" B, not "contains" B.
9. **Note**: If you make a mistake or no longer want a criteria in your list, click once on it to highlight it, then click Remove.

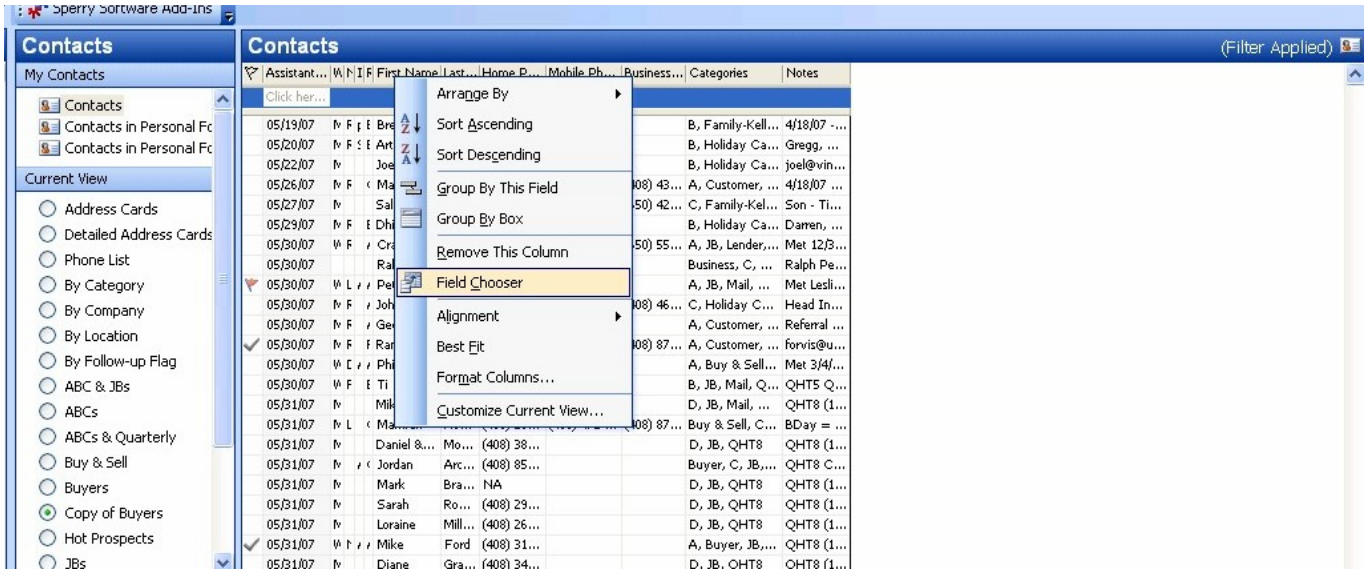
10. When you're done with your criteria, click OK to close the Filter pop-up.

b. In the Customize View screen, click on Sort
   1. At the bottom left of the next pop up, select All Contact Fields from the "Select Available Fields From" drop down list.
   2. At the top left of the pop up, select "Assistant's Name" from the "Sort Items By" drop down list.
   3. Select OK
   4. Select OK again
   5. At the Custom View Organizer, click Apply View

c. You now have a customized view showing all your Jelly Beans, sorted by your last contact with them.

d. **Note**: you can later use this new View, Jelly Beans, as your template to make other views for your Jelly Beans. You can make a bunch of Views – show those Jelly Beans who are most Active, only Buyers, only Sellers, those that are going to Buy & Sell, etc…

3. Sorting:
   a. By clicking on a header, you can sort by that Field. Clicking on that header again, will reverse the sort order (ascending / descending).



4. We could have changed the Fields displayed in the Customize View pop up window when we were creating our new View. But we can also do it now.
    a. Right-click on any field name (header) at the top of our Jelly Bean list view. This brings up a list of actions for us to pick from.
    b. Select "Field Chooser".
    c. At the top of the Field Chooser pop-up, select All Contact Fields. This displays only Contact Fields for us to choose from.
    d. Select First Name, and drag it between whichever Field headers you want it in. When you unclick (let go) it's now one of your field headers.
    e. Repeat for Last Name, or whatever fields you want.
    f. To remove any unwanted fields from the list, just grab that header and drag down into the list and let go. That header is removed.

Conclusion:
This will get you started, but there's a lot more in Outlook. Experiment with it. You can find answers to some questions by looking them up on the internet as well.
Get started using Outlook.

"Anything worth doing is worth doing POORLY"
Remember a hundred years ago we were poorly flying planes.
Fifty years ago we were using computers poorly.

It gets better by starting and getting better bit by bit.

Go Get 'Em

TRAINING #15

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TRAINER NOTES

Purpose:

Demonstrate using a system that you can manage.

The impulse is to hunt for or even worse, try to force, the client to write tomorrow morning at 9AM. The better way to run a long-term business is to drive and manage the system. (Scientific Marketing)

We need to understand the "funnel" concept of lead migration.

You must know where you are now and what your focus is at that point.

BEGIN:

Diagram on the flipchart:
Notice this diagram is NOT to scale!

↓

200 Jelly Beans

Focus on: QHT™ and Collecting JB's, All the while making appointments with existing JB's

↓

6-8 On-Deck

Focus on: Keeping in very close contact with your probed people Making sure you always have 3 Probing™ appointments per week.

↓

3 Certified Buyers/Sellers

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

↓

Escrow

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

↓

Get PAID $$

Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

TRAINER NOTES

Notice that number of items at each level gets smaller:

6 Billion People on the Planet
200 Jelly Beans
6-8 prospects (On-deck)
3 C-B/S
2 Escrows
1 Get Paid

Not every person makes it to the next level. Expect fallout and plan for it.

At the mature stage, when your JB jar is mature and you start getting people into escrow, your focus NEVER changes:
Focus on: Making sure you keep 6-8 on deck. Making sure you always have 3 Probing™ appointments per week.

It is the Probing™ appointments that drive the on-deck, which then drives the C-B/S, which then drives the escrows.

Remember: Escrows take care of themselves. They will let you know what to do and you will find a way to do it. You cannot ignore it; it will come find you.

Certified buyers and sellers are the same way.

It is losing your focus on making three Probing™ appointments that will flat-line your business.

SCENARIOS:

New: **Under 100 JB's with a CB**

{think of it as Accidental business!]
Still need to have primary focus on getting to 200 JB's

Intermediate: About 200 JB's with NO CB

Relentlessly call the JB's with intention to get a Probing™ appointment. Use long-term Needs analysis and Strategy.

Intermediate/advanced: about 200 JB's with 2-3 CB or escrows with less than 6 on-deck.

This is classic engineering a flat line. Needs to focus immediately on getting 3 Probing™ appointments per week. Escrow will close and you will have to start over!

TRAINER NOTES

Advanced: Getting close to graduation.

Needs to be at 200 JB's with 50-75 turned over (replaced) 2-3 Probing™ appointments per week – FOR LIFE Will drive you to level production rather than bouncing and starting over.

BACK TOGETHER:

Ask for commitments that will take the person to the next step.
Be directive. They may not know what they need to do. Don't let them be wimpy.

If they are in the under 200 JB' they must commit to 10 per week.
They can take whatever comes into the QHT™ and add the best of the door-knocking contacts to get to ten.

If the time is slow at the QHT™ – ask them to call the best of the Door-knocking and invite them over.

Make sure they commit to talking with and asking for a Probing™ appointment from every jellybean every time they talk.

If they are in the Advanced group, make sure they validate their on-deck and Committed buyers and sellers with you.

ASK:

"What did you learn from your work?
What are you going to do about it?"