
The Journey To Mastery™ Forms

_____ Date

A large area of horizontal lines for writing notes, consisting of 30 light blue lines on a white background, framed by a dark blue border on the right and top.



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

Table with 6 columns: Date, Name, Address, Y/N, Initials, Comments. The table is currently empty.



_____ Date

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AGENT: _____
 DATE: _____
 ADDRESS: _____

NAME _____
 ADDRESS _____
 CITY _____ STATE _____ ZIP _____
 PHONE # _____ EMAIL _____
 OCCUPATION _____

Your first visit? Yes No
Do you: Own Rent
When do you need a home?
 Now 1-3 Months 3-6 Months
How did you hear of us?
 Friend Driving by Newspaper
 Signs Radio Other

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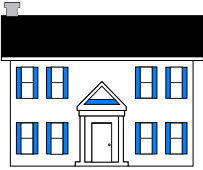
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Name _____

Phone () _____

I Individual Demographic Yes No

- 1. Are you familiar with the area? Yes No
- 2. Do you own a home now? Yes No
- 3. How long have you been looking? 30 60 90 120+
- 4. Have you been looking in this area? Yes No
- 5. Have you seen a lot of properties? Yes No
- 6. Have you ever purchased property before? Yes No

Special Property Questions:

[Empty box for special property questions]

Yes No

- 1. Do you work in the area? Yes No
- 2. What kind of work do you do? Type: _____
- 3. How many people in your family? 2 3 4 5+
- 4. What do you like about homes you have seen _____
- 5. In what price range are you looking? Yes No
- 6. Have you been pre-qualified by a lender? Yes No
- 7. How soon are you moving? 30 60 90 120+

[Empty box]

- 1. How soon can we meet together again? _____
- 2. When would be a good time to meet? _____
- 3. Which time would be best for you? _____ or _____?
- 4. Let's meet together on _____ or _____ at _____ or _____.

[Empty box]

Our appointment is scheduled for _____ at _____.

I will call you the day before to confirm our appointment. When will be a good time to call? At what phone number? _____

[Empty box]

Confirmation required

Reestablish relationship.

I will be calling to button down our appointment for _____ at _____. You can count on me to be there, can I count on you? "Yes." Great! I look forward to seeing you _____ at _____.



_____ Date

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AGENT NAME: _____

WEEK BEGINS: _____

OFFICE: _____

SUMMARY OF LAST WEEK:

of Open Houses _____ #Leads _____ #Drop by _____ #Probes _____ #Write offer _____ #Open Escrows _____ # Closed Escrows _____

TIP ANALYSIS:

#T _____ %P _____ %I _____ %N _____ Avg. Hrs. Day _____ Avg. N hrs Day _____

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date							
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							

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

	Scheduled Open House Addresses	Date	Time
1			
2			
3			



_____ Date

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AGENT NAME: _____
MENTOR : _____ **DATE:** _____

SECTION I ATTENDANCE (circle one)
 Present / Excused / Unexcused

SECTION II TIME MANAGEMENT

- Weekly Schedule
- Tip Analysis
- 20 Hours Prospecting
- 8 Appointments
- 2 Quantum Home Tours™ Scheduled

SECTION III ACTIVITY

Number of Quantum Home Tours™ held: _____
 Names & phone numbers collected: _____
 Number of appointments from Quantum Home Tour™: _____
 Number of Drop By appointments from Quantum Home Tour™: _____
 Total Number of appointments: _____
 Number of new clients/prospects this week (list) or (see new prospect roster): _____

1. Name: _____	Phone: _____	Address: _____	Source: _____
2. Name: _____	Phone: _____	Address: _____	Source: _____
3. Name: _____	Phone: _____	Address: _____	Source: _____
4. Name: _____	Phone: _____	Address: _____	Source: _____
5. Name: _____	Phone: _____	Address: _____	Source: _____
6. Name: _____	Phone: _____	Address: _____	Source: _____

Number of Listing Presentations Made: _____
 Number of Certified Buyers™ total (list): _____

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

SECTION III RESULTS

Number of new escrows open this week: _____
 Number of escrows open total: _____



_____ Date

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

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

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

PHASE ONE - BUYER INTERVIEW

WE HAVE AGREED:

- YES NO
- 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.



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In exchange for you as an agent/broker company, working in finding a property for me, I agree to work **exclusively** with you, to the exclusion of any other broker/company and agent, for a period of _____ days. Also, I understand that you may present offers on my behalf for property offered as "For Sale By Owner".

I understand that I may continue to look at other properties, open houses, and responding to advertisements provided that I inform other parties that I am currently employing you as my agent/broker company and will identify you as my exclusive agent.

As the agent under this agreement, you will provide me exclusive information on all properties requested by me that are obtained by seeing other properties, open houses and advertisements. You agree to represent me and my interests.

Business Cards Provided

_____ Clients

_____ Date

_____ Agent

_____ Broker

_____ Date

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O.E.-Directives

1. Describe for me
2. Tell me about
3. What are your attitudes about
4. What are your feelings concerning
5. What would your feelings be if

MODIFIERS

- What
- When
- Where
- Why
- How

TAG- (Crystallization)

What does ___ mean to you?

SUMMARY

1. It appears that___
2. So what you are telling me is___
3. If I understand correctly___
4. What I hear you saying is___

CLOSED END

1. So one of the things you are looking for is___
2. The thing that is important is___

PROBING TIME

1. Introduction
2. Permission
3. Grid/Pool
4. Summarize needs
5. Set up next step

ISSUES:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.