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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QUANTUM MANAGEMENT SYSTEMS

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Licensor		licensee	
By:	____________	By:	____________
Name:	____________	Name:	____________
Its:	____________	Its:	____________
Date:	____________	Date:	____________

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QUANTUM MANAGEMENT SYSTEMS

The first purpose of Action Monday's is for new Account Representatives to go over the past week's schedule. Be acknowledged for what they did complete and be "held accountable" for what they did not complete. (See Accountability Script) Being held accountable is not a punishment but a privilege. Having someone to take the time to give feedback to the person stuck and not seeing what they scheduled, clearly for their best interest, how it could have been accomplished and getting that support is truly a gift.

At 9:00 you will meet with your Team Leaders. You will be running this group and being the model for how they will run their group for that morning. You will be reviewing their past weeks schedule holding accountable and reviewing next weeks schedule (this should have been made out in advance). You will determine which "Cluster Group" they will go to after team break. Have them write their name in appropriate group as each person is completed.
This should last 45 minutes with a 15 minute break so all is ready for the 10:00 meeting.

The room is set in horseshoe (see Ideal Room Setup).

Warm greeting to all and proceed with wins and struggles. This allows for them to share their experiences of the week and learn from each other. This will go 10:00 to 10:45.
You may see the need to spend 10 to 15 minutes in this time frame to review a training piece depending on what has come up in your morning group or something that has been shared that morning.

They will now break into their individual teams. It will be determined by the results of this past week what "Cluster Group" they will go to after the break. The Team Leader will direct each person after review of schedule to go to cluster sign up sheet to sign name under group they will go to after break. You will walk room and listen in on groups to see how they are doing. This will last 10:45 to 11:20. Then 15 minute break.

Back from break – break into Clusters.

9:00 to 9:45 ACTION MONDAY MANAGER RUNS MEETING WITH TEAM LEADERS

As *their* team leader you fill out:

TEAM LEADER'S CLUSTER REPORT & EXCEPTIONS LIST

(You will have determined which Cluster Group they will join after the Team Meeting and have them write it on the group list on wall.)

Team members attach to their file completed:

WEEKLY SCHEDULE (filled out for next week)

ACCOUNT REPRESENTATIVE REPORT (filled out with current information)

(Make sure room is re-set for start of meeting in horseshoe)

9:45 to 10:00 BREAK for Team Leaders

10:00 SHARP ACTION MONDAY BEGINS

10:00 to 10:45 WARM UP AND WINS & STRUGGLES

(Paperwork my NOT be done in the room! after it starts!!!)

10:45 to 11:20 TEAM LEADERS MEET WITH THEIR TEAMS

Team Leaders conduct their group just like you did with them at 9:00. (With the exception of Prospect Certification) Team Leader will complete **TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST**

They will, at the end of their meeting, have determined which Cluster Group each will be coming back to after break and have them write in on the appropriate group page. They also attach their **Weekly Schedule** and **Account Representative Report** in their folder.)

11:20 to 11:35 BREAK

11:35 to 12:25 CLUSTER GROUP MEETING

People not meeting standard come back after lunch for TRIAGE. The standard being: 0, 1 and 2 groups always go to Triage. If someone has been in group 3 or 4 for more than 3 weeks in a row without movement then they go to Triage. No one in group 5 is required to go to Triage and may leave after Cluster Meeting.

LUNCH BREAK (Manager determines time: 1hr to 1 ½ hours)

1:30 (or as determined) TRIAGE

To last 1 ½ to 2 hours.

Action Monday Manager to fill out:

- **MANAGER'S CLUSTER REPORT ANASYSIS & EXCEPTION LIST REPORT**.
- Manager to complete computer spreadsheet for Doug & Ellaine Yeaman.

These 2 reports are to be E-Mailed to Doug. Cluster Report by Tuesday after Action Monday. The spreadsheet by Friday of that week to be E-mailed to both Doug and Ellaine's individual E-mails.

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 Hub Event™
    - 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 Account Representative. 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 Account Representatives.

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

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 Account Representative 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 Account Representative is attached to the outside of the folder and Account Representatives 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 Account Representatives 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 prospectforms and other forms necessary in the processing of the media transaction. The Account Representatives should be directed to have schedules and reports filled out prior to coming into the training room. Of course we do need to get themup to speed the first couple of weeks and someone will need to be standing by to offer assistance to any new Account Representatives.

III Welcome – The opening of each action Monday will begin by a few minutes of sharing wins and areas where Account Representatives 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 Account Representative to Account Representative relationships and the Account Representative to trainer relationship.

1. Wins –

Account Representatives take an opportunity to discuss wins be they at an Hub Event™ or the bell going off in their head allowing them to see the next relevant step in their journey as media Account Representatives. This is something that 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 – Or Challenges (NOT LOSSES)

this is also important, it allows the Account Representative to see and learn from his/her fellow Account Representative'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 Account Representative, 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 Account Representatives** - This is specifically directed to new Account Representatives who have no appointments and have yet to complete basic skill modules to move into the next group. Focus is on scripts and oriientation items.

ii. Group 1 – **No appointments.** This group is directed towards helping Account Representatives schedule more appointments. This group is focused on driving business to them with vehicles such as Hub Event™ their sphere of influence, getting their name out and showing that they are actively working in media. Focus is on scheduling Hub Events™and setting up Jelly Bean Jar for lead follow-up; mastering scripts! Hub Events™are scheduled here and everyone has one!

iii. Group 2 – **One to three appointments** – this group continues to look for more appointments; thus driving their business. Discussions center around networking and Hub Events™and making sure these are scheduled and getting leads and appointments. Focus is on scheduling and running Hub Events™™; 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 Hub Events™™;may include scheduling another Hub Event™ or buttoning down leads to appointments. Focus is on more appointments.

v. Group 4 – **Six or more Appointments** – this group works to create prospects from their appointmens. The focus is on probing and making sure the appointments are with real people.

vi. Group 5 – **Three or more certified prospects** – this group works to certify their prospects; looking for input on bringing their prospects to the end of the certification process and having a contract in place. Discussions are around re-certifying prospects and re-probing appointments for potential prospects that have not written contracts. Focus in getting contracts written; they are exempt from running Hub Events™™.

VII Break

Lunch Break

VIII Triage

Triage is an opportunity for Account Representatives 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.

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 recieve a clear yes, this is how they take responsiblilty for the result of their commitment. If you do not recieve a clear yes ask them again "could you have kept your commitment to be here on time?" stay with them until you recieve 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!

The purpose of Cluster Groups is to receive support on moving forward with the immediate goal being to advance to the next group.

In the beginning each group is led by a company experienced Account Representative that is participating in the program by supplying Hub Events™ and that are trained on how to support participants in the JTM process. On start up these groups may started with company managers. Once you start to have graduated JTM Account Representatives they are the ideal leader to volunteer to support these groups. The advantage to the graduated JTM Account Representative is that it keeps you fresh in the training environment and in the commitment environment. Also when you give to others good things come back to you.

Group 0

As new Account Representatives enter the program they stay approximately 2 weeks in this group to get through the checklist for the basics in office orientation, operation and getting set up to work. They "graduate" from this group when they have completed the list. This group is usually run by someone in the administration staff.

Groups 1 through 4 are detailed in manual.

Group 5 is run by Action Manager. This is where new Prospects are Certified or prospects in process are re-Certified.

*Participants may be in two groups. Say they only have 1 appointment but they have 1 certified prospect. They would go to group 2 (1-3 appointments) and then to group 5 to have the one prospect certified.

The purpose of Cluster Groups is to receive support on moving forward with the immediate goal being to advance to the next group.

Objective for each participant in Cluster Group is: "*How am I going to get to the next group up?*"

Time allotted for Cluster Groups is approximately 1hour.

A. GROUP 0 – NEW ACCOUNT REPRESENTATIVE

As new Account Representatives enter the program they stay approximately 2 weeks in this group to get through the checklist for the basics in office orientation, and getting set up to work. They "graduate" from this group when they have completed the list. This group is usually run by someone in the administration staff.

ACTION: *Focus is on scripts and orientation items. This group always comes back after lunch break for TRIAGE.*

B. GROUP 1 – NO APPOINTMENTS

This group is directed towards helping Account Representatives schedule more appointments. This group is focused on driving business to them with vehicles such as Hub Event™, their sphere of influence, getting their name out and showing that they are actively working in media.

ACTION: *Focus is on scheduling Hub Events™ and setting up Jelly Bean Jar for lead follow-up and mastering scripts! Hub Events™are scheduled here and everyone has one. This group always comes back after lunch break for TRIAGE.*

C. GROUP 2 – ONE TO THREE APPPOINTMENTS

This group continues to look for more appointments; thus driving their business. Discussions center around networking and Hub Events™ and making sure these are scheduled and getting leads and appointments.

ACTION: *Focus is on scheduling and running Hub Events™,* better script mastery! Run them better and make more appointments. *This group will come back after lunch break for TRIAGE.*

D. 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 Hub Events™; may include scheduling another Quantum Home Tour or buttoning down leads to appointments.

ACTION: *The focus is on more appointments. This group will comeback after lunch for TRIAGE.*

E. GROUP 4 – SIX OR MORE APPOINTMENTS

This group works to create prospects from their appointments.

ACTION: *The focus is on probing and making sure the appointments are with real people (prospects or sellers). Does not have to come back from lunch with 6 or more appointments. If they have been in this group 2 weeks with out converting 1 or more to certified prospects the are to attend TRIAGE for more training.*

F. GROUP 5 – THREE OR MORE CERTIFIED PROSPECTS

This group works to certify their prospects; looking for input on bringing their prospects to the end of the certification process and having a contract in place. Discussions are around re-certifying prospects and re-probing appointments for potential prospects that have not written contracts.

ACTION: *Focus in getting contracts written; they are exempt from running Hub Events™. This group does not have to return after lunch. They are doing business.*

Standard for being in afternoon *Triage:*

0,1,2 & 3 groups will always be in afternoon Triage group for further practice and reinforcement. If someone has been in group 3 or 4 without movement forward then they are to participate with the Triage group to work on skill sets they need to move forward. Group 5 is always done after Cluster meeting and does not come.

The people coming back after lunch break are the ones not meeting standard. This is not punishment but extra assistance in practice sessions to break through where they are stuck right now.

They breakdown into two basic groups:

#1. APPOINTMENTS:

If they are not making enough appoints to have prospects they are working on appointment making skills. Problem solving on where they are failing to connect with potential clients. Are they not connecting on Hub Events™ – practice on Hub Event™ scripts and asking to simply drop by to deliver “stuff”. Practice on *ASKING* for the appointment. They break down in small groups of 2 or 3 and practice with each other or having one observer to make comments and suggestions.

If their appointments are not showing up work on confirm scripts.

#2. PROSPECTS:

They have prospects but they are not buying in a timely manner. They work on PROBING-PROBING-PROBING. They need to be more confident and connect better with prospect in the initial probing session. Again they break down in small groups of 2 or 3 and practice with each other or having one observer to make comments and suggestions.

You will be going to each group dropping in where appropriate for comments and suggestion as well. Being responsible for the whole groups progress. If it requires taking time to bring the whole groups attention to re-emphasise training piece do it. You are responsible for them getting to their next phase.

These sessions should last approximately 1 ½ to 2 hours.

TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name____________________

Date____________________

Section I Attendance

Number of people in cluster _____
Number present _____
Number Late/Still coming _____
Number no show _____
Total (Must balance) _____

Names of no shows
1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________

Section II Results

Number of contracts begun _____
Number of contracts signed _____
Number of new clients taken _____

People not making standard
1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________

5 min

Section III Time Management

Yes	No	
☐	☐	Check to see Rep is using system
☐	☐	Check monthly calendar (scheduled events)
☐	☐	Daily work planner for every day worked
☐	☐	Logging P I N's
☐	☐	Check "I" time (15-20 hrs)
☐	☐	Check "P" time (10-15 hrs)

People off of TM System
1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________

10 min

Section IV Review Week

☐ Write all "real" leads on "Certified Prospect Checklist" collected during week & put into file

Lead name
Phone number
Address
Account Representative's name
Hub Event™ name

☐ Prepare all new prospects for Prospect Certification group

☐ Re-Certify all Certified Prospects and prepare for Certification group

10 min

J T
T M

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

Section V Analysis

Identify Which Group Individualswill be going

Hub Events™ invites ______

Media kits handed out ______

Invitations handed out ______

Appointments made ______

Certified Prospects ______

Assign to Cluster Group ① ② ③ ④ ⑤

People not inviting to Hub Events™

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 Prospects

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 prospect to see what has to happen to put needs analysis or presentation together.
4. Verify that each individual is using appointment technology.
5. Review how to handle Hub Event™ 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 Prospects
   * Set 2 appointments for formal presentation
   * Write 1 contract

5 min

People needing special attention

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

ACCOUNT REPRESENTATIVE REPORT

ACCOUNT REPRESENTATIVE NAME: ________________________________

MENTOR : ________________________________ **DATE:** ______________________

SECTION I **ATTENDANCE** (circle one)

Present / Hiatus / Unexcused

SECTION II **TIME MANAGEMENT**

- ❑ Weekly Schedule
- ❑ Tip Analysis
- ❑ 20 Hours Prospecting
- ❑ 6 Appointments
- ❑ Hub Events™ Scheduled

SECTION III **ACTIVITY**

Hub Events™held: ________

Names & phone numbers collected: ________

Number of appointments from Hub Event™: ________

Number of Drop By appointments for Hub Event™: ________

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 Prospects™ total (list):________

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________
6. ________________________________

SECTION III **RESULTS**

Number of new contracts open this week: ________

Number of contracts open total: ________

QUANTUM MANAGEMENT SYSTEMS

AGNTRPRT

WEEKLY SCHEDULE

ACCOUNT REPRESENTATIVE NAME: ______________________________

OFFICE: ______________________________

WEEK BEGINS: ____________________

SUMMARY OF LAST WEEK:

of Hub Events™ ™_____ #Leads_____ #Drop by_____#Probes_____ #Write offer _____#Open Contracts______ # Closed Contracts_______

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							

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

	Scheduled Hub Event™ Addresses	Date	Time
1			
2			
3			

QUANTUM MANAGEMENT SYSTEMS

WKLY SCHD QHT

COMMITTED PROSPECT CHECKLIST

For	Company
Prospect	Date acquired
Date called	Appointment Date:
Hub Event™	Address
Work phone ( )	Home phone ( )

PROSPECT SOURCE:

Hub Event™..............a
Floorcall....................b
Jelly Been Jar............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 prospect, but the prospects I do engage with, MUST be committed to producing results.

PHASE ONE - PROSPECT 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 Account Representative and I represent you.
❑ ❑ 5. (Prospects agreement attached)
❑ ❑ 6. That you will be **Pre-Approved** by___________ for $____________________.
❑ ❑ 7. That you are prepared to buy now.
❑ ❑ 8. Date/time of next appointment.

____
❑ ❑ 9. That we will be in communication.
❑ ❑ 10. Prospect 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 Account Representatives 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 contract 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 contract 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 prospect.(Go to 5B)

PHASE 5A

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

PHASE 5B

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

QUANTUM MANAGEMENT SYSTEMS

EXCLUSIVE PROSPECT RELATIONSHIP AGREEMENT

In exchange for you as an Account Representative/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 Account Representative, for ~~a pe~~riod 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, Hub Events™, and responding to advertisements provided that I inform other parties that I am currently employing you as my Account Representative/broker company and will identify you as my exclusive Account Representative.

As the Account Representative 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 Hub Events™ and advertisements, and, 3) property listed as "For Sale By Owner". You, as my Account Representative/broker company, agree to represent me and my interests.

☐

Business Cards Provided

____________________________ ____________________________

Prospects Date

____

Account Representative

____

Broker

MANAGER'S ACTION MONDAY™ REPORT, ANALYSIS & EXCEPTION LIST

Action Monday Report

1. Total Account Representatives in JTM ______
2. Total New Pended Transactions ______
3. Total New Listings ______

Section I Cluster Reports And Team Analysis

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

Completed

☐

Section II Report on Action Monday™

1. Assign Hub Event™ signs and fliers. ____
2. Report average appointments/Account Representative (Group 1+) probing/drop bys ____
3. Report total number of Account Representatives with 6 appointments+ ____
4. Report total number Account Representatives with Certified Prospects ____
5. Report total number of Certified Prospects in JTM™ ____
6. Report total number of Account Representatives below standard and getting notice ____

Section III Report on Production

1. Report all Account Representatives with 3 Certified Prospects

________	________	________
________	________	________
________	________	________

2. Report all Listings Taken

Account Representatives	Property
________	________
________	________

QUANTUM MANAGEMENT SYSTEMS

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MANAGER'S ACTION MONDAY™ REPORT, ANALYSIS & EXCEPTION LIST

Section III Report on Production (Cont'd)

TRANSACTIONS OPENED THIS WEEK:

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

(B) Buying Account Representative, (S) Selling Account Representative, (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

QUANTUM MANAGEMENT SYSTEMS

MANAGER'S ACTION MONDAY™ REPORT, ANALYSIS & EXCEPTION LIST

Section III Report on Production (Cont'd)

TRANSACTIONS CLOSED:

Property Address	Client	Price	Date Closed

Comments:

QUANTUM MANAGEMENT SYSTEMS

Team Report

SAMPLE TEAM LEADERS REPORT FROM TEAM MEETINGS

* This is your agenda; check off *

TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name Ima Starr

Date 9/29/03

Section I Attendance

Number of people in cluster		12
Number present	8	
Number excused	2	
Number no show	2	
Total (Must balance)		12

Names of no shows
1. Emma Lost
2. Gonna Fishkin
3.
4.
5.

Section II Results

Number of escrows opened	3
Number of escrows closed	1
Number of listings taken	2

People not making standard
1. Irma Looser
2. Bobby Bust
3.
4.
5.

5 min

Section III Time Management *Check off as addressed*

Yes	No	
☑	☐	Check to see agent is using system
☑	☐	Check monthly calendar (scheduled events)
☑	☐	Daily work planner for every day worked
☑	☐	Logging P I N's
☑	☐	Check "I" time (15-20 hrs)
☑	☐	Check "P" time (10-15 hrs)

People off of TM System
1. Conrad Fuzed
2. Otto Control
3. Clew Less
4.
5.
6.

10 min

Section IV Review Week *Check off as addressed*

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

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

☑ Prepare all new clients on for Buyer Certification group

☑ Re-Certify all <u>Certified Buyers</u> and prepare for Certification group

10 min

QUANTUM MANAGEMENT SYSTEMS

JTTM

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 ← This is group activity for cluster

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

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

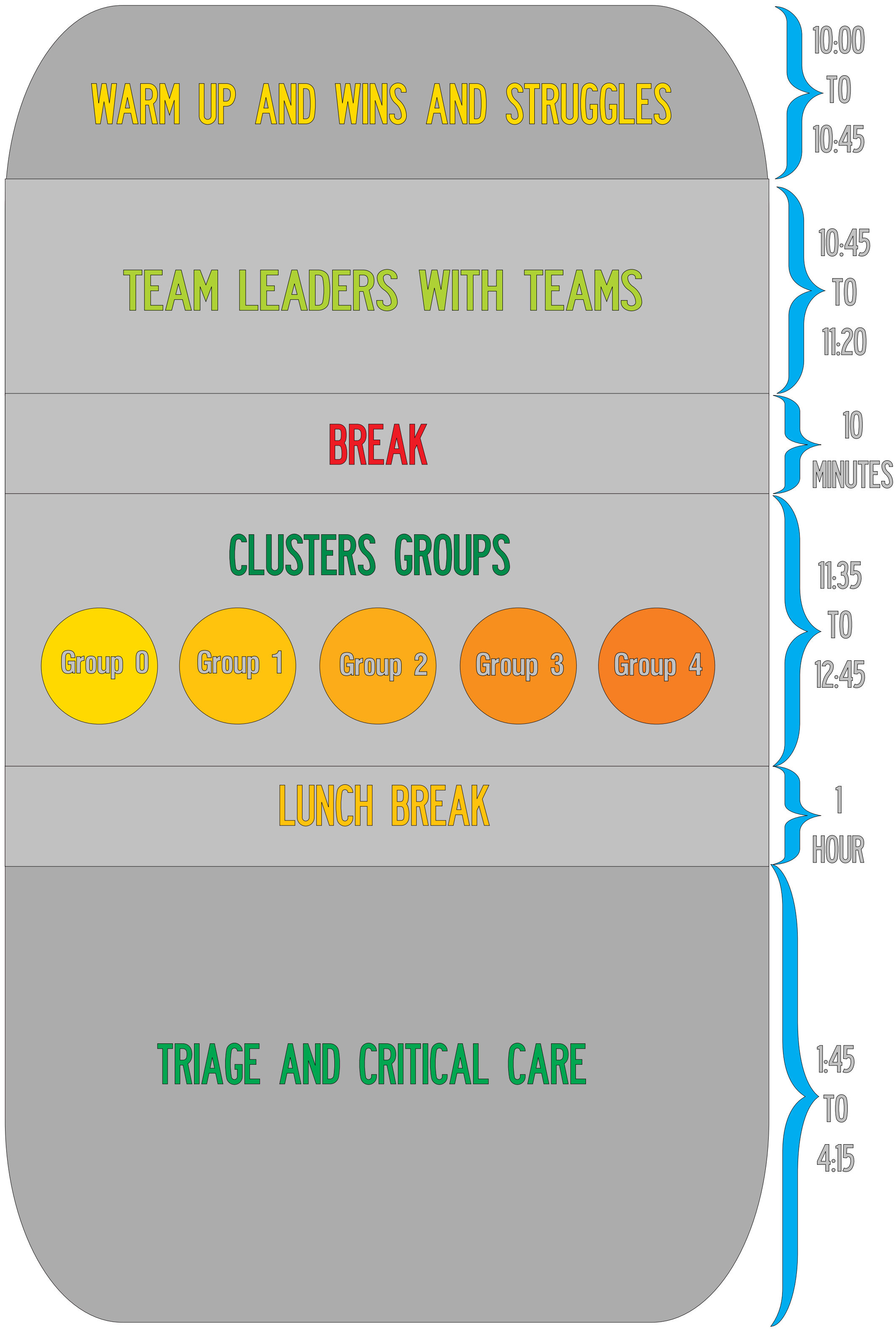
QUANTUM MANAGEMENT SYSTEMS

MGRACTMN.PM4 11/93

SCHEDULE

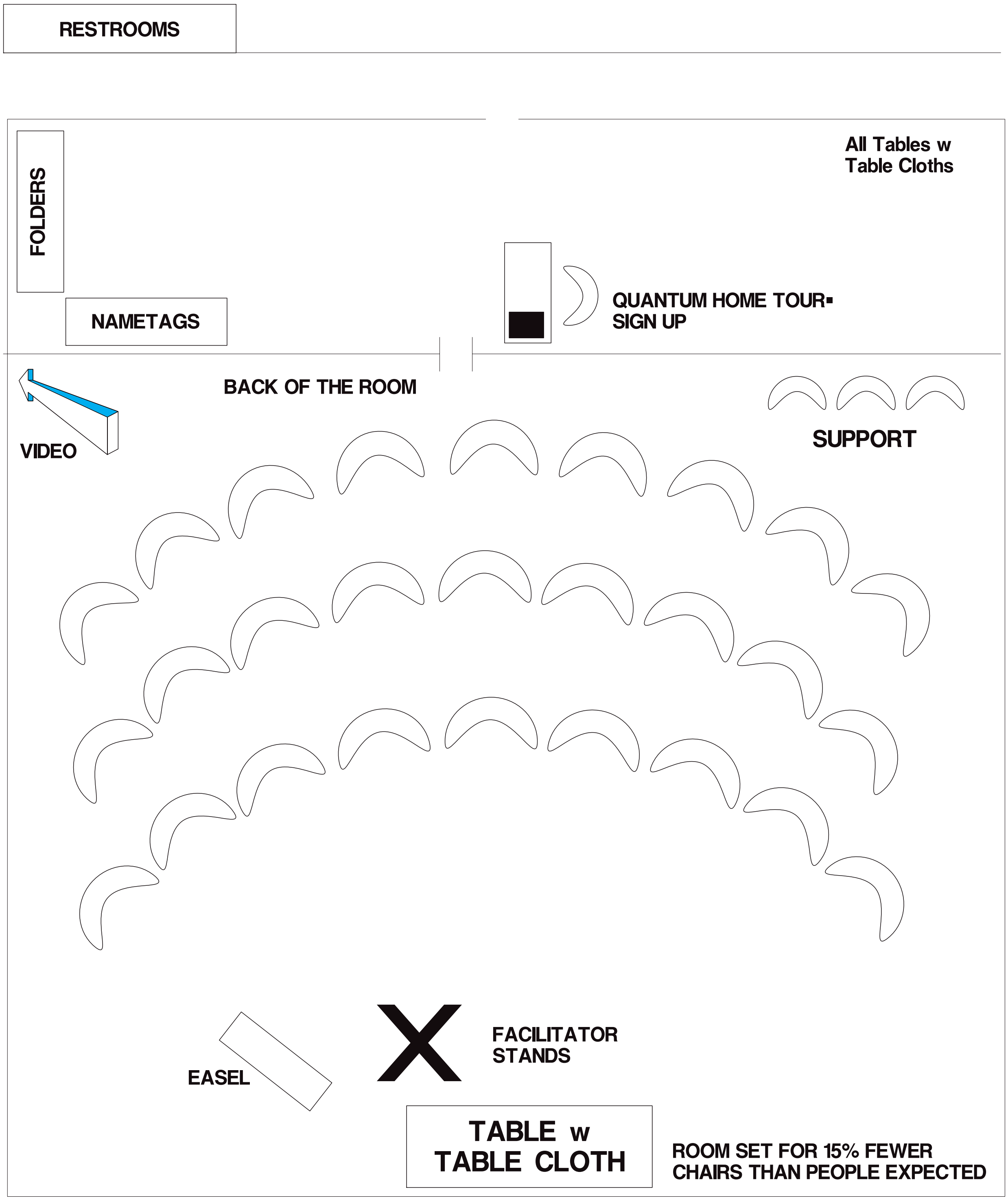
SAMPLE MANAGERS SCHEDULE OF THE DAY

MANAGERS
ACTION MONDAY TIMELINE



SET-UP & SUPPLIES

Ideal Room Setup



SUPPLIES NEEDED

1. Conference room
2. Flip Chart with Paper
3. Chairs
4. Hub Event™ inventory
5. Room and Directional Signs
6. Fliers/invitations (Stock supply, write in address)
7. JTM Cluster and Account Representative 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 Prospect 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 Hub Events™ and Company invitational events available for scheduling
20. One Appointment a Day Poster, "Posted"

See Action Monday Workshop Manual