

# Foundation For The Training

**The Strategic Lead Management™ also known as SLM™ is designed to help you identify ways in which you will become more effective. The success of the program requires the following:**

- ☐ 1. Attendance to each and every module.
- ☐ 2. Attendance on time to each module. Returning on time from breaks.
- ☐ 3. A commitment to use the concepts and materials for the duration of the program.
- ☐ 4. Making commitments to specific action arising out of the material in each module, and following directions of the trainer when in the training room.
- ☐ 5. No telephone calls, interruptions or messages into the training room. No magazines, newspapers or other non-training materials read or displayed in the training room. This includes food, gum, drink cups, etc. (except as agreed to with the trainer in advance).
- ☐ 6. All cellular phones and/or portable paging systems are to be turned off or left outside the training room and participant agrees to no texting or checking cell phones while in the training. If a cell phone goes off during the training, the Training Manager will accept and hold all such units to be left outside the room.
- ☐ 7. Name tags to be worn at all times during the training modules, and at all times be clearly visible.
- ☐ 8. Remaining in the training room for the duration of each session. There will be frequent breaks.
- ☐ 9. No drugs or alcohol during any break. All prescribed drugs are to be cleared with the Training Manager.
- ☐ 10. Conversations during the sessions are limited to between trainers and participants only. Conversations between fellow participants are not permitted.
- ☐ 11. Time of the completed training is unscheduled. Do not make any plans immediately following the completion of the training.
- ☐ 12. The content of the training is a private and confidential matter between you and the group. All materials, forms, concepts and conversations shall be kept strictly confidential.
- ☐ 13. If a participant misses a significant part of any module, he or she, at the sole determination of the trainer, will need to take the entire training over.
- ☐ 14. When the size of the training permits, participants shall sit next to someone that he/she did not know or have a relationship with prior to the training. This includes family, friends and business associates.
- ☐ 15. Chairs are arranged and positioned in the training for a specific purpose. Participants shall not move any chairs during the training.

Signature\_\_\_\_\_Date\_\_\_\_\_

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Printed Name

\_\_\_\_\_  
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\_\_\_\_\_  
Date

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Date



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\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
License Granted By      Date

\_\_\_\_\_  
Signed      Date



### A NEW Lead Management Model

- ❑ We are the industry authority lead capture with 30 + years
- ❑ We have designed a structure, a strategy and a plan with our “New Lead Management Model”
- ❑ It is proprietary and currently exclusive to our solution

### Current Lead Management Conditions

*Quantum Management Systems has conducted tracking studies of lead capture since 1978.*

- ❑ TThe studies have tracked inbound ad calls, internet leads and various other sources.
- ❑ The lead generating source did not matter and the capture rate remained the same.
- ❑ Recently conducted a tracking study on density of Lead Generation population.
- ❑ Quantum established that the number of actual leads converted from 10,000 leads in the study was 82% over a 9 to 15 month period.

### Term of the Buyer's Cycle



- ❑ **Active Phase** - defined as the period in which the buyer is making a final buying decision, i.e. write a check or sign a contract.
- ❑ **Information Gathering Phase** - defined as a period during which the buyer is doing due-diligence, researching and developing an information base from which to make an informed decision.
- ❑ **Percolation Phase** - defined as the earliest stage of thinking or feeling a relatively distant need or desire to buy a product.

### Lead Conversion

- 48% of sales people never follow up with a prospect
- 25% of sales people make a second contact and stop
- 12% of sales people only make three contacts and stop
- Only 10% of sales people make more than three contacts
- 2% of sales are made on the first contact
- 3% of sales are made on the second contact
- 5% of sales are made on the third contact
- 10% of sales are made on the fourth contact
- 80% of sales are made on the fifth to twelfth contact

Source: National Sales Executive Association

- Nothing happens without an appointment
- If a lead is contacted 1 hour later - Value drops 100 X
- State of the art technology, scripts & coaching generates Lead Capture in 5 minutes
- Conversion occurs: First contact & month 9 of engagement
- 80%+ of lead conversion occur after 5th-12th contact
- 80% of ALL leads must be contacted - 7x minimum

### How We Address The Problem

- ▣ Highly trained, managed & scripted Lead Capture Center
- ▣ Buying Cycle Phases
  - Percolation
  - Information Gathering
  - Active Incubation
- ▣ Incubation
  - WE Incubate, NOT nurture leads
  - Prospect gets nurtured in Incubation
- ▣ We deliver a higher ratio face-to-face appointment
  - Beyond All other models
- ▣ Moreover, we offer our proprietary solution, “Incubation”
  - Incubation Leads Require More
    - Time
    - Communications
    - Motivations
- ▣ Our Strategy;
  - “Help consumers without selling them anything



# Lead Development Process





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## **TRANSFORMATIONS**

### GROWTH & CHANGE IN ADULT

LIFE by Roger L. Gould, Simon and Schuster, 1978

## **Introduction**

This book was born ten years ago, when a dream I had cherished collided with reality.

Having grown up in Milwaukee, Wisconsin; I went to college in Madison, where, during the second week of school, I fell in love with my extraordinary-in-every-way wife, Renee. Our first daughter, Lauren, was born in Chicago during my second year of medical school (she hated to go to bed and I needed to study). Our second daughter, Cheryl (who, thank God, loved to play by herself, was born in Los Angeles a few years later during my medical internship. Then there were two miserable years in Fort Polk, Louisiana, renowned as the worst possible assignment in the Army (108 degrees Fahrenheit during the summer, with 99 percent humidity). We returned to Los Angeles after the Army so that I could complete my residency. By the time I'd finished my psychiatric training, we'd lived in seven different rented houses and apartments.

The dream was that Renee and I would own our own house. We had been in Los Angeles long enough to like it, and it was time to buy a house and settle into a neighborhood. I now had a good salary guaranteed by the state of California: I was to be assistant director of the UCLA Psychiatric Outpatient Department. So Renee and I rushed out and bought the house we had fallen in love with. We had no financial hedge against hard times: there was only one salary and no savings. We were a bit jittery, but it all worked out on paper, and, besides, we each had parents we could lean on temporarily if some financial disaster did occur.

So the dream came true on moving day. Each of us claimed a room, filled it with our personal belongings, lined the cupboards,

set up the lamps, kept the cats out of the way, and made ourselves visible to the neighbors in case they wanted to welcome us. In the moments between moving men, I proudly surveyed the house and yard from every angle. When the last moving man closed the door, we were alone in this strange place.

We slept fitfully that night even though we were exhausted. The next night, we each tried to manufacture our share of cheerfulness, but despite our friends' ceremonial bottle of champagne in the afternoon, we both felt profoundly depressed. "What's wrong?" I asked. "Why are we so depressed just at the crest of fulfilling our dream?" Although we didn't know it, we were caught by the forces of a powerful, predictable contradiction.

The dream of owning a house is constructed in childhood and becomes a myth about our adulthood. We prefigure the experience and then expect pure joy when it actually happens. However, the experience of owning a house carries with it realities never imagined in our dream. It has a meaning our young minds had no way of knowing. We felt sadness the second night in our dream house because something had died. What died was a protective illusion connecting us to childhood and our parents. We could no longer believe that we were children on loan to California, destined to return to our "real" home. Only after the illusion died did we recognize its silent presence. In the back of our minds, we were protecting ourselves against the full realization that this was really our life, to be lived into an unknown future. A tether to our parents was torn, and we mourned it. We were a bit less fettered by the codes of life our parents had woven into the tether, but we were left temporarily unanchored in time and space.

This forgotten childhood assumption, that I would live my adult life in my hometown near my family and friends, is not the kind of assumption one thinks of in a debate or an exploratory conversation. It is more like a wish and therefore leads to unrealistic expectation and disappointment, which in this are feelings of sadness. As I later discovered my disappointment at having to give up this rather minor false assumption of my childhood is part of a process of shedding a whole network of assumptions, rules, fantasies, irrationalities and rigidities that tie us to our childhood consciousness. This network of assumptions allows us to believe, on a non rational, emotional level, that we've never really left the safe world provided by omnipotent parents. The act of taking a step into

an adult life-our moving into our new house-exposed this second, unsuspected emotional reality; a childhood consciousness coexisted alongside our rational, adult view of reality.

This event in my life, which I might have passed over as another peculiar reaction, unworthy of explanation, has become an impetus for the book that follows. For this book is about that second, unsuspected reality: how it supports and stabilizes us, how it interferes with our life, and how we can and must master it if we're to have an unfolding creative life.

Over the next few days, these sad, unanchored feelings gradually subsided. We resumed our lives but with a new sense of immediacy and fullness. Renee and I felt fortunate that we had experienced this unexpected discontent simultaneously, for we both realized that if one of us had been completely satisfied with being in the new house, the happy one wouldn't have understood the other's "morbid" reaction to this long-awaited event. An argument of some kind would have undoubtedly followed because either she or I would have "ruined" the pleasure of the other. As a psychiatrist, I would have looked for the neurotic origins in myself or in her and tried to search out the memory a traumatic move in childhood.

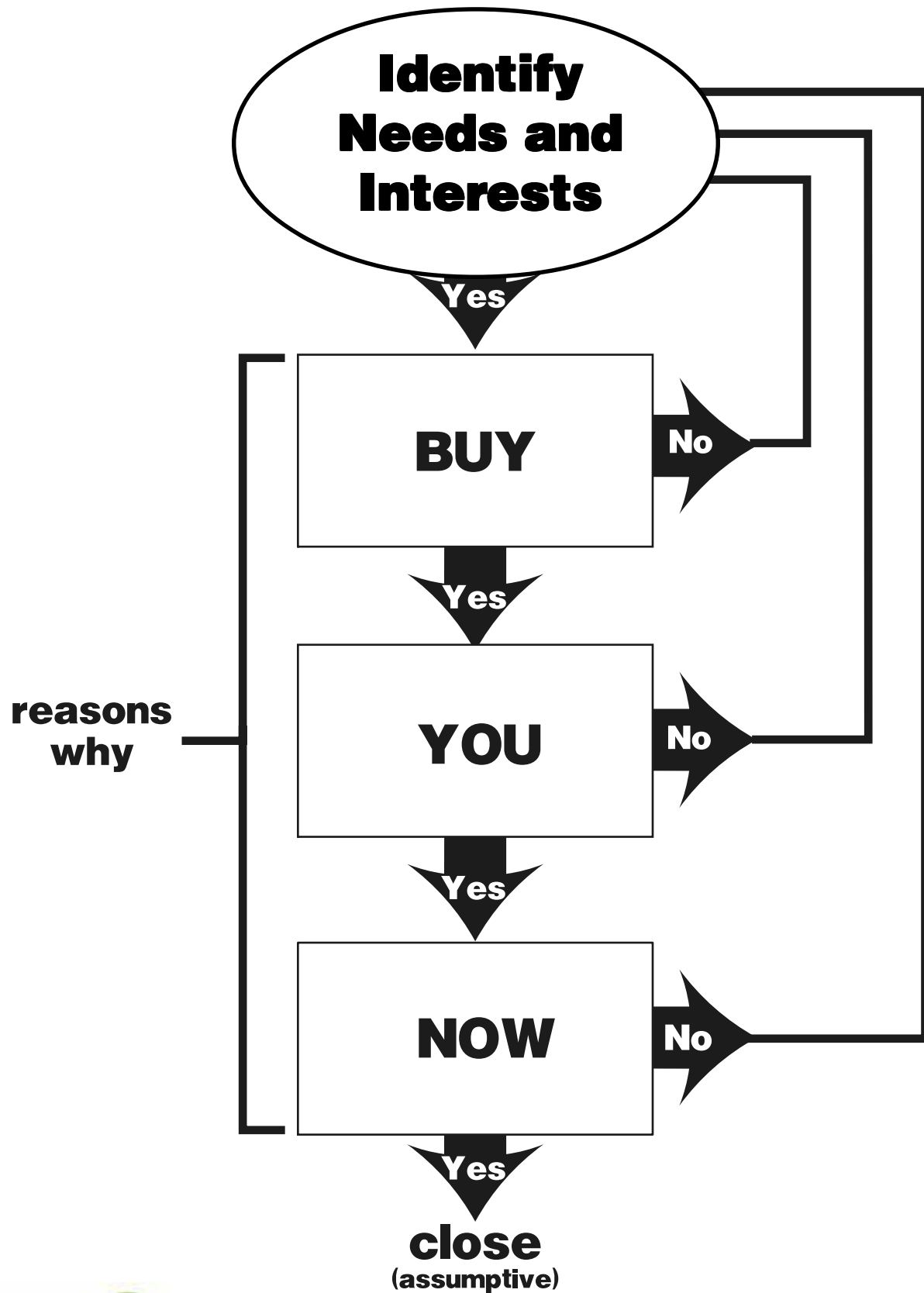
However, it began to dawn on us that our response had nothing to do with a forgotten childhood event. Instead, it was a response to our current position in life and to the transition that had brought us there. In fact, it was a reaction set in motion because we had moved a step further into our own created life. The unexpected sadness we felt upon realizing our dream was probably inevitable. If only we had known. Wouldn't it be nice, we thought, if someone had written a Dr. Spock for adults so that we could have expected this? Someone should have predicted and labeled the mourning and discomfort that accompany every growth step. Perhaps then adults could be spared some of the pain and misunderstanding of significant life events. How many other major, hazardous growth steps awaited in the future? How many had we already muddled through without knowing? Yes, someone, we thought, ought to write a Dr. Spock for adults. And then we forgot about it.

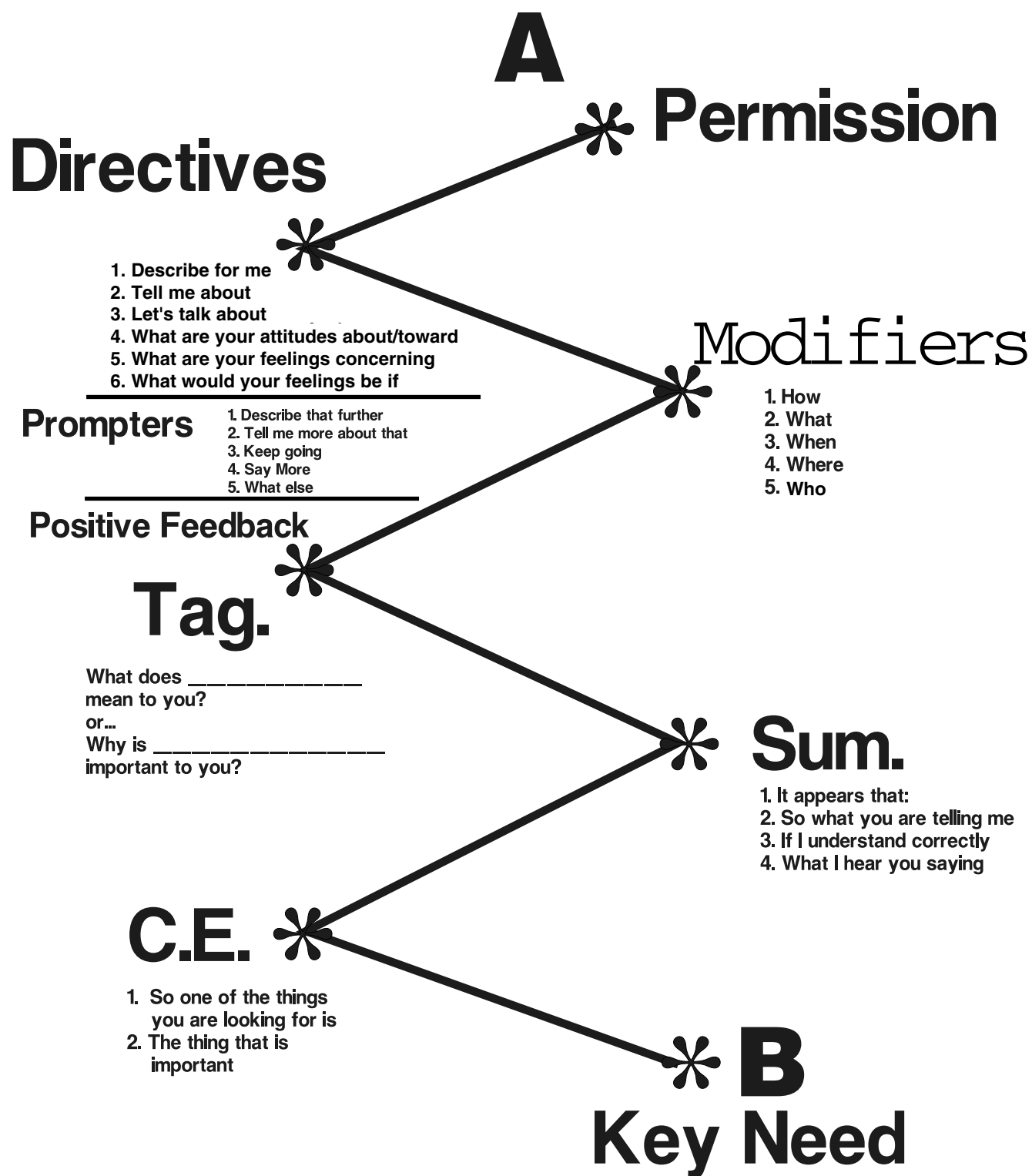
Several years later, while supervising psychiatric residents, I became acquainted indirectly with the life stories of approximately a hundred and twenty-five people over a five-year period. The supervisory position turned out to be crucial to the development of

my theories about normal adult changes, for I began to see patterns that I couldn't have seen if I had known the people more directly. The resident psychiatrists filtered for me the compelling but obscuring uniqueness of each individual.

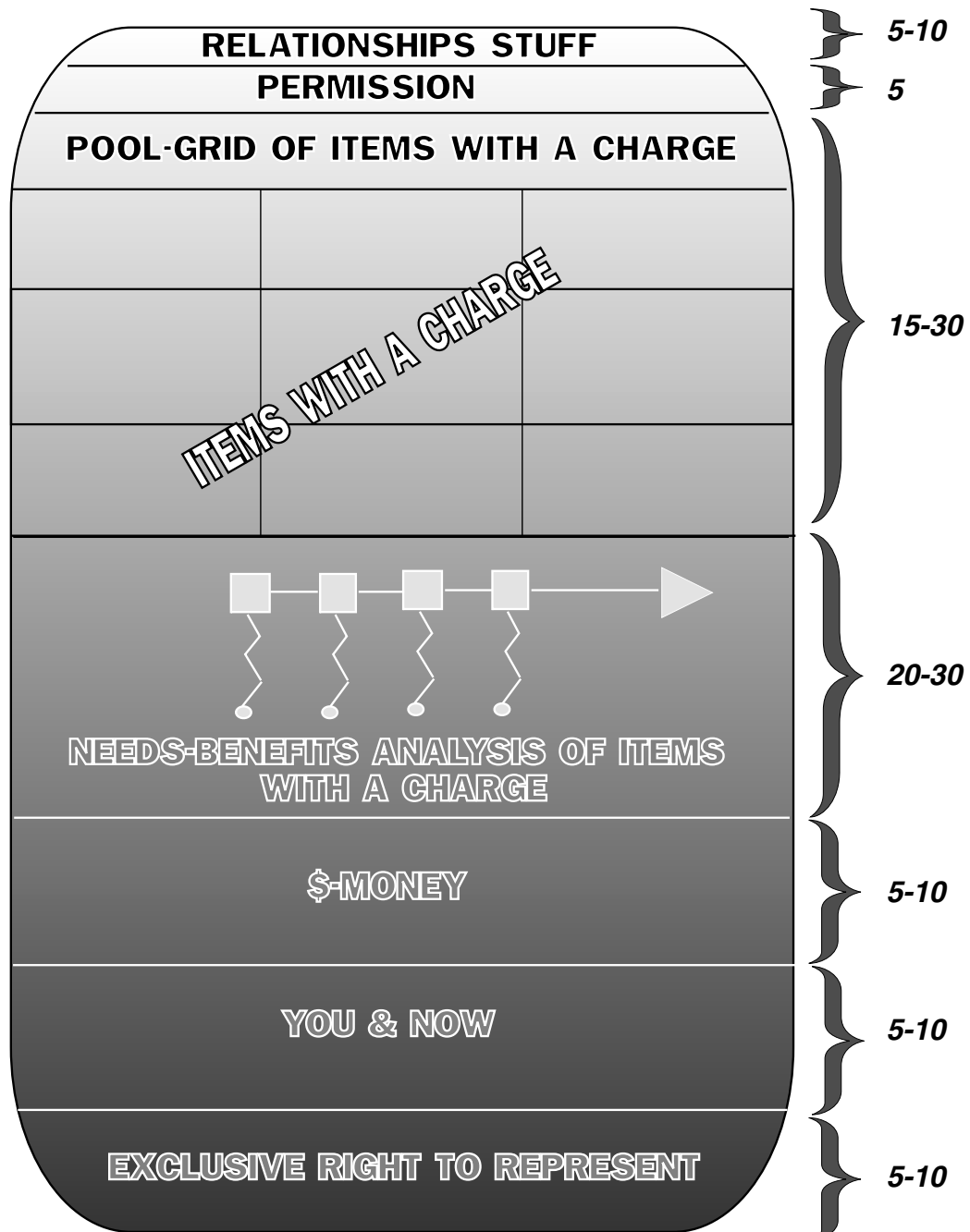
When I asked the simple orienting questions—"What is the patient's major area of concern? Why did this person seek treatment at this time?"—I began to hear answers that sounded age-related. All teenagers were preoccupied with their parents. Undeniably, people in their twenties were preoccupied with vocational choice, with their new roles as spouses and parents, or with their inability to get into those roles. People in their early thirties talked about being stuck and mired down; the same important topics of life suddenly seemed vague, more diffuse and more difficult for them to understand. People in their late thirties and early forties all were experiencing an intense discontent and were feeling an urgency about determining what their lives had been and what they still could be.

As I brought these observations home, Renee and I began to ask ourselves if this was not preliminary evidence of a predictable sequence of changing patterns and preoccupation during the adult years. We began to see that certain key events—buying a house, a first car, experiencing a first job, a first baby, the first loss of a parent, first physical injury or first clear sign of aging—force us to see ourselves more as the creators of our lives and less as living out the lives we thought were our destiny. Only gradually do we let go of the values and programs of our parents' way of life. Progressively, we become freer to determine our own lives.





## Interveiw Timeline





## Needs/Benefits Language

- 1) **Comfort**
- 2) **Convenience**
- 3) **Privacy - Sanctuary**
- 4) **Prestige/Esteem**
- 5) **Love**
- 6) **Sex**
- 7) **Value (Making Money)**
- 8) **Economy (Saving Money)**
- 9) **Aesthetics**
- 10) **Security (Peace of Mind)**
- 11) **Safety (Physical Safety)**
- 12) **Recreation**
- 13) **Entertainment**
- 14) **Health**
- 15) **Self-Actualization (Personal Development or Expression)**

## **Before SLM™ Needs Analysis Getting Permission**

In order for us to determine whether or not I can help you, I need to ask you a few questions. They may feel personal or it may be that you have not considered these issues and that may make you feel uncomfortable, is that going to be ok?

## **At The End Of SLM™ Needs Analysis: "Here's How I Work"**

Let me tell you how I work:

Im going to give you a list of homes for sale now and ones that have sold very recently so you can determine what property in your price range would be in different locations.

When you determine which area best suits you, and you are ready to look at specific properties, hoping to find one to make an offer on, we will go together to find and evaluate the best properties on the market that suit your needs.

I am willing to commit that time to you, provided that during the time that we are working together you will commit to working exclusively with me.

Will that be OK? Great! I have an agreement here that states in writing our agreement to work together on an exclusive basis.

(Hand client the agreement and a pen).

## At The End Of SLM™ Needs Analysis: "Here's How I Work"

"Let me tell you how I work:

I appreciate all the information you have shared with me. It will be very valuable to be able take this information back to my team and design a Campaign (program) tailored with these specifics in mind.

I am going to go to work for you and I am ready to commit all the time and resources necessary on my end to come up with a plan that will really work for you. I want you to feel *you and I* are a team and working together.

Will that work for you?

## **At The End Of SLM™ Needs Analysis: "Here's How I Work"**

Let me tell you how I work:

I will look at every home that is on the market in your price range, but I will only show you homes that meet your needs. In my experience, it will take about 10 houses for me to find one that works for you.

That means that if we are going to see 3 or 4 homes the next time we get together, I will have to preview 30 or 40 properties. I am willing to commit that time to you, provided that during the time that we are working together you will commit to working exclusively with me.

Will that be OK? Great! I have an agreement here that states in writing our agreement to work together on an exclusive basis.

(Hand client the agreement and a pen).

### Confirmation Script-After Setting Showing Appointment

“I will line up properties for you to consider writing 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 (saturday) \_\_\_\_\_ when we are seeing properties, 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) \_\_\_\_\_.”

# Client Needs Analysis


## **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
6. Talk about
7. Help me understand

## **MODIFIERS**

What  
When  
Where  
Who  
How

## **TAG- (Crystallization)**

1. What does \_\_\_\_ mean to you?
2. Why is \_\_\_\_ important 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 \_\_\_\_

## **ANALYSIS TIME**

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

## **PROMPTERS**

1. Describe that further
2. Tell me more about that/the
3. Keep going
4. Say more about that
5. What else?
6. Go On

## **ISSUES:**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.



# Client Needs Analysis


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## **ISSUES:**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

# Committed Buyer Checklist

**Agent Name**

**Client**

**Date acquired**

**Date called**

**Appointment Date:**

**Comment:**

**Work phone ( )**

**Home phone ( )**

**CLIENT SOURCE:**

Open House.....a  
Floorcall.....b  
Jelly Bean Jar.....c  
Sign Call.....d  
Farm.....e  
Mailout.....f  
Internet.....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-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. 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 FOUR 4A - 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.

# Relationship Agreement

In exchange for you as an agent/broker company, working in finding a property for me, I agree to work *exclusively* with you to 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

Clients

Date

Agent

Broker

## Pathfinding - Implementation - Results

Visions	Relevant Steps	Commitments	Date	Results
A. Personal	1	<input type="checkbox"/>	<input type="checkbox"/>	
	2			
	3			
	4			
B. Business	1	<input type="checkbox"/>	<input type="checkbox"/>	
	2			
	3			
	4			
C. Family/Relationships	1	<input type="checkbox"/>	<input type="checkbox"/>	
	2			
	3			
	4			
D. Health/Recreation	1	<input type="checkbox"/>	<input type="checkbox"/>	
	2			
	3			
	4			