QUANTUM MASTERS COACHING

Owner's Manual

Date

Training Notes

QUANTUM
MANAGEMENT
SYSTEMS

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Some Workshop Issues

Who is a Master?

Level 1 [New or below office/company standards]
Need basic skills and a system to work (Jelly Bean Jar)
Served best by the Journey to Mastery™ program or a very basic Action Group dedicated to examining their daily activities.

Your office/company “standard” is determined by finding the median person’s productivity within your organization. Everyone below the median is below average and needs specific support getting to a level of mastery that meets the standard.

Level 2 [Veterans struggling with the change in the market]
These are the core representatives. They produce enough to meet your office/company standard, but need help with creating level income, consistent work habits and a system that works. They may have experienced a sudden drop in income as the market changed. They need to be coached to have an income that causes them to see balance in their lives and UT as a permanent employment opportunity.

This is the primary group to begin with. Their improvement will change your bottom line. They are by far the biggest group. They want and need your support.

Level 3 [The top 10-20 percent of the office/company.]
Need balance, burnout-control and consistent income.
Not necessarily just about more money.
Same number of hours gives 25% more money plus finding balance is the goal for 70-80% of these representatives.

Who and how does the group get formed?

Two groups in one day will really take it out of you. You are really on, connecting and operating at a high level. It can be draining.

Inaugural group: Network behind the scenes. Get the group of 8 together before you announce it. It works to have it full before you announce it.

Announce it at a meeting. This is an on-going and continuing thing. If they aren’t in the first group they can be in the second group.

You want the first group to be the right people. Not the ne’er do wells and complainers. You want people who want to improve. You want the leaders and bell-cows of the office/company.

You can run two groups fairly close one after the other.

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Several things will be absolutely required

They must commit to:

1. Keep track of their schedule, planned and actual
2. Make commitments to each area every week
3. Participate

The TIP analysis will get them to see the real data so they can KNOW what they are squandering their time and money on that is ineffectual and non-productive.

The process of making commitments is important.

Life is like a string guitar. It needs to be tuned and be in balance. Otherwise the part that is out of sync brings down the others.

Making the vision happen is not a matter of knowing what to do. We already know what to do. It is a matter of creating new habits that really work. When a child learns to walk, it does not get up and walk one day… It stands up and falls down. Up and down…again and again until it finally can walk upright.

Your role is facilitator. You lead the group. Encourage discussion. Draw out of them what they already know. You are the stage director.

This coaching is not like coaching the beginners and non-producers. The Masters are looking for more in their life. They want to have a great career and have a life.

A big part of this process is that they will process (probe) themselves. Find out what is important for them and what they are willing to pay to have it.

Vision is in four areas: Personal – Business – Relationships/family - Health
They will each make commitments to each of those areas every week. It is the process of commitment that will help them get to what is really important, what makes it important and creates the habits that support what's really important.

The coaching process is made up of many parts.

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Language of Coaching:

Holding people accountable in such a way that they learn and see their next step is an art and a science.

It is NOT about making them wrong or guilty so they will do what they said. We call that "parental language." It is counter-productive and creates an atmosphere of mistrust.

The purpose of accountability is for them to examine the results themselves. They will get into the habit of enquiry when things go awry and take personal responsibility for what happened and to make changes and adjustments so the future will be different.

It is very important that you use language with them that improves their chances of getting into that habit. You cannot sound like a scolding parent, finding fault, making them wrong or bad. It is about them discovering the choices they made, and which ones are not working.

The steps to accountability (the science of it) are:

1. **Did you make a commitment to ___________?**
2. **Did you keep that commitment?**
3. **What happened?**
   Get their story out. You don't want the quick answer; you want the story of what happened to stop them.
4. **What would you have needed to do differently to make it happen?**
   Was the commitment important to you when you made it?
   Is what you did and got consistent with what it is you really want?
   This is where they get creative. Where they see their own participation in the outcome.
5. **Could you have kept the commitment?**
   Get to them to recognize they have control and authority over what happens and how they handle it. This is where they take responsibility for their choices.
6. **Do you want to re-commit to it?**
   Yes or no depending upon why they made it to begin with and whether or not it is consistent with what they say they want.
   Be careful that they don't slide backwards here to be sure they will make it next time.
   "I said I would call 20 people and didn't make it, so I will only commit to 10."
7. **How are you feeling about the commitment and the results?**
   Make sure they are not experiencing being wrong and guilty
   i.e. Are you clear that you just made decisions that weren't in your best interest?
   You aren't wrong you're just Late!

Parental language sounds more like:

Why didn't you do what you said you would?
It seems to me you should be doing more of _____ or _____.

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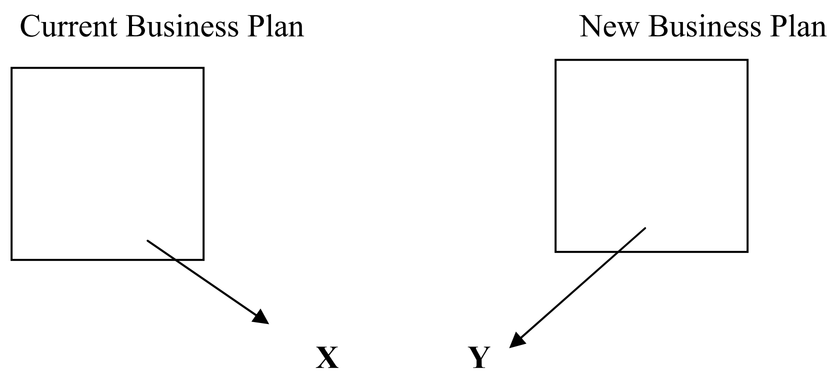
You can't be trusted to ___________.
You should have done this. You shouldn't have done that.
Your problem is ____________.
What's the matter with you?

Moving to adopting the new Business Plan:



Assume my present "Business Plan" is: that I need to work ***really hard,*** grab and hold every person who looks or acts anything like a potential client. I am a veteran and already know how to do this ***"selling advertising thing"***. It takes a lot of time and it's hard to make a lot of money in selling advertising.

Now the new business plan is that I work 40 hours per week, take 2 days off every week. I only work with those who have demonstrated that they are real buyers (potential clients). I easily get business from my Jelly Bean Jar. I now make appointments that go from probing to presentation to contract easily because I **KNOW** what my client Wants and Needs.

One fine day my best Client refers me a lead for new business. In my conversation with this lead he says he will only do business if I cut my rate, which will compromise my "standard". If I take the referral and blame my referrer, lose time and money with a non-productive customer, and so on.

I *BELIEVE* I can either keep my referrer happy or turn down the customer. I can't do both. I am not thinking in AND logic. There is a way to both keep the referrer happy and not take the customer.

There is a dissonance between my current vision (who I think I am) and the new one (who I want to be.)

If you experience conflict, it is because of the resistance to the new vision.

AND thinking is the natural outcome of living the Business Plan.

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"I can't because…"
Question: was the action consistent with your new business plan? Was it relevant to cause the plan to actualize?

YES: you have new insight.
NO: Then examine why did you make it in the first place?

If Yes: Then it is relevant, find out what stopped the AND thinking?

Often, they just haven't had a lot of decision-making in the new plan. It takes a while to get into the habit of being productive by doing what is truly productive rather than what looks like it is.

Representatives want to make more money and have time off.

If they have a current vision, it tells them they need to work hard and long. What they need to do is practice working on productive things and letting go of or delegating non productive things. Notice they work *hard* and *long* on non productive stuff, not on productive stuff.

When they make commitments and don't do them, one of three things occurred.

1. They just fell down. Skiing is not about skiing; it is about staying upright on skis. Need to just keep practicing.

2. Made an irrelevant commitment.

3. Made a commitment to prove that the new business plan just doesn't work. That I can't do things that way.

Positive Affirmations
We're looking for the experience of having the goal. A goal is a target. Ask what does having the goal bring to you?

Goal: lose 25 pounds this year. Ride bike 3 times per week.
Vision: I am in the greatest shape ever and am at my perfect weight.

If they make commitments that clearly cannot be done, they are giving power to the old vision, confirming that the new one can't be done. Help them out here.
Called ***"Let's play pretend!"***

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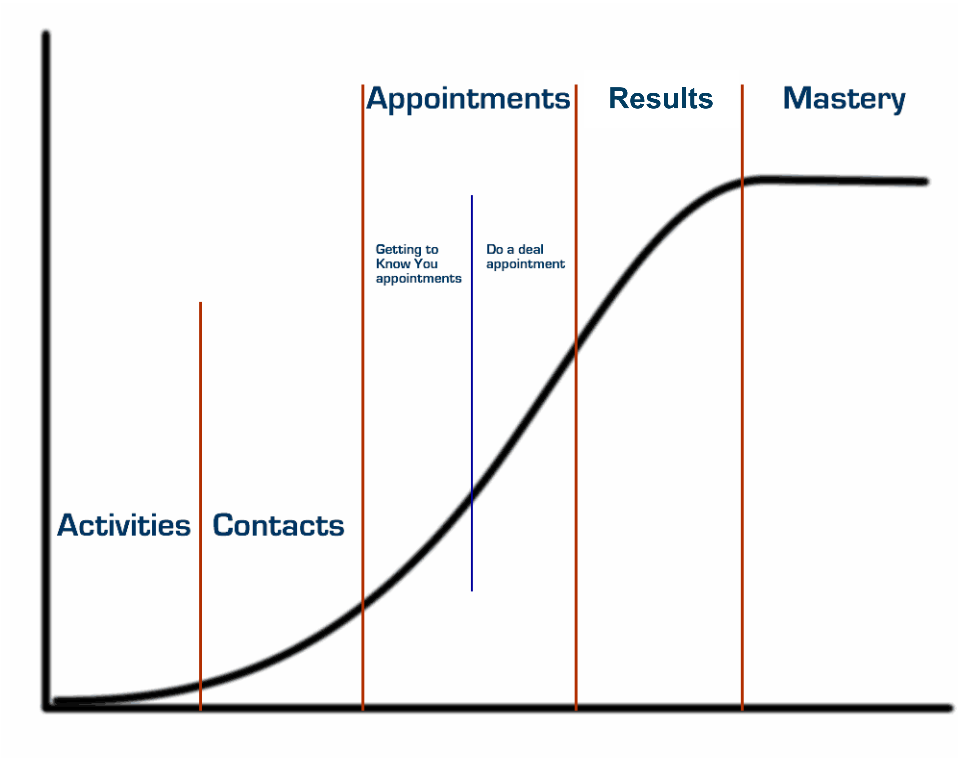
The S-Curve



This is the S-Curve for the quality of production over time. It is a process. One must go through each step to get to Mastery. The S-Curve or Learning Curve is real for any new endeavor…From learning to ski to becoming a master Media Rep.

Activities:
The things you must do to get started. For instance, getting the names and numbers of past clients, Sphere of Influence into a database. Learning to use the computer, using the CRM online system to keep in touch and build long term client relationships. These are things that are important, take time and everything is on hold until they are handled. Get them done quickly!

Contacts:
This is generally where most prospecting programs end. "If you make "some magic number" of contacts every week, you will be successful!" What a lie. However one must get in the habit and learn the discipline of making contact with a certain minimum number of people every week.

Appointments:
This is where the magic begins. When the focus changes to making appointments the nature of the contacts change. The first kinds of appointment we make are the get-acquainted, drop-off-something, get-reacquainted appointment. These are relationship development appointments. After one is accomplished at asking and getting

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appointments, we change the focus to getting “Probing” and deal-making appointments. Such as making presentations, reviewing issues with presentations and the necessary decisions, and writing and presenting final programs and options, etc.

Results:
This is where the appointments take one. Contracts lead to a 1st relationship meeting and 2nd (?) meeting needs analysis, and 3rd (?) meeting: presentations and proposals, etc.

Mastery:
When the system is working in such a way that one has a constant, level flow of presentations and closing proposals at a level that affords a great income and balance in life, that is mastery.

CLUSTER GROUPS

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 (grow) to the next up-group?”

Group 1 – New Representatives:
As new 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 and have completed 3 appointments on their own. This group is usually run by ________________. They will also get trained in making appointments, probing skills, making drop by appointments in the field, how to build and make presentations-proposals and contract resolution.

ACTION: Focus is on orientation items, scripts, getting business started. This group always comes back after lunch for *TRIAGE*.

Group 2 – One to Three Appointments:
This group continues to look for more appointments. Support in phone skills, probing, and appointment-making language. Sit and listen to calls being made to pinpoint problem areas.

ACTION: Focus is on scheduling more appointments, and script mastery. This group will come back after lunch break for *TRIAGE*.

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CLUSTER GROUPS Cont'd

Group 3 – More than three appointments, less than six:
This group needs to see how to do more of what they are doing to make appointments. It maybe time management, numbers of calls they are making or the need to increase or improve skills.

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

Group 4 – Six or more appointments
This group works to create "clients" from their appointments.

ACTION: This group works to make sure they are working with "real" clients. May need support in recognizing "real" clients. Discussions are around about recognizing "real" clients and re-probing appointments for potential clients that have not written contracts. Check to see how well they present proposals and how mature their skills are at closing the sale. Leave for the day.

Group 5 – Three or more certified clients/presentations or proposals
This group works to certify their clients; looking for input on bringing their clients to the end of the certification process and having a contract in place. Discussions are around re-certifying clients and re-probing appointments for potential clients that have not written contracts.

ACTION: Focus in getting contracts written. This group does not have to return after lunch. They are doing business. Leave for the day.

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Time line for the 19 weeks [Every other week]

Week -2
Determine who you want in your first group. This is ongoing, so you will be starting new groups. Contact them and get a commitment for 7-10 of them to be the first group.

Week -1
Announce it at your general meeting. First come, first served. Make appointments Remember that the first one is already filled.

Week 0
Announce the first one is starting at the Office/company Meeting. Assure them there will be another series along soon.

Week 1
Coaching Meeting One

Week 3
Coaching Meeting Two

Week 5
S.E.L.L.™ Days 1 and 2

Week 7
S.E.L.L.™ Day 3 & Scientific Marketing (SELL Day 4)

Week 9
Coaching Meeting Three

Week 11
Coaching Meeting Four

Week 13
Coaching Meeting Five

Week 15
Probing Day 1 & 2 & 3

Week 17
Coaching Meeting Six

Week 19
Coaching Meeting Seven

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Meeting One: [week 1]

Slow this meeting down. It is not an accountability meeting. I am a facilitator for their learning. THIS IS A 2 HOUR MEETING.

Overview of the program

It is interactive.
Give your job description
Dates and time. Make sure they are all on board for the times. Changes must work for you.

General shaping and probing

Where are you now in your career?
What are the primary obstacles to your progress?
What do you want to get out of the coaching meetings?

License Agreement

EVERYONE signs and dates the license. The original goes to QMS and you keep a copy. This is what prevents them from taking this material to another company and using it against you.

Foundation for Coaching:

There is a sample Foundation available.
Leave room for them to add to it. This is their training. If you have the right group, they will be very sensitive to anyone wasting their time.
If a person can't make a meeting, absolutely if they can't make two, ask them to take the next one.

Make very sure they understand that this is the condition under which this training will proceed and they will be held ***strictly accountable*** to it. They will be dropped from the Coaching Workshop [not the company] if they don't want to work this way.

You want the group to create peer pressure accountability at a very high level. Be methodical in laying down the foundation so the group will say it's not ok not to show up.

Example: "I need to address the group. My boss called for a meeting" (he was a manager learning the process and his boss was the president of a major company). The group said "NO!" He did get permission to go outside and handle it with his boss.
Empowers the group to say "our time is as valuable as yours."

Do what-if scenarios. What if you have an accounting issue on this meeting day? What if you have a presentation that is in trouble, etc? Start here learning to create solutions.

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Pre-Business Plan Worksheet
Hand it out. Go over it with them. Item by Item
The Manager/Trainer needs to OWN this worksheet. Know what the questions mean and what the answers mean.

> They will need to keep track of their actual spent time in their time-management system and ***bring it with them to coaching meetings***.

Get a commitment to all the dates. Including the all day trainings.

Have a group discussion about what constitutes productive behavior.

Homework: Complete the Business Analysis

Hand out commitment-tracking sheets for the full 12-weeks to keep track of their commitments.
They must bring them to every meeting, completed.

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Meeting Two: [week 3]

What good things are happening?
Review Commitments (out loud)
Explore what got in the way when something did. What did you learn, what can you do differently?

Discuss their Time Management data

This will come just after the S.E.L.L.™ (Day 1&2) It will be used in the Scientific Marketing Training. It MUST be complete by then.
Challenge what they spend their time and money on.

Need the

- $ earned
- $ Volume sales
- Amount of time spent getting the client
- Amount of time spent after contract signed
- Number of competed contracts done
- Source of client (friend, past client, calling new prospects etc.)

Discuss I-time and P-time. Review what constitutes I and P time.
Lead a discussion about what is causing them problems in their business? Not to find answers, but to recognize the problems.

Chaos: what causes it, what is the path out of it?
What would it mean to have a constant, level income?
If a client who is 60 days from being able to write a contract insist on you take him to lunch or some kind of event. Do you? Why?

Hand out PIN™ Analysis Data sheet.

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Between Meeting Two and Three is Day 1 and 2 of S.E.L.L.

S.E.L.L.™ & Scientific Marketing [week 5]

Sales Environment Learning Laboratory™
Scientific Marketing™

This is a commitment-based and activity-oriented training that is both informational and transformational. While it is **not** specifically **motivational** people do come away from the training feeling both motivated and energized.

The training deals specifically with the techniques that are critical to success:

- **Organization and Time Management:**
  which drives your business and measures your progress
- **Coherent prospecting techniques:**
  which do not impose cold canvassing
- **Strategies for turning leads into sales**
- **Client Communication skills:**
  which create trust and relationship,
  as well as get detailed information
- **Creating committed customer relationships**
- **Increasing closing ratios**

Participants learn how to evaluate their use of time and to look at what prevents them from getting what they want. They learn to evaluate the present reality about themselves, their customers and their environment as a first step in creating what they want.

The Sales Environment Learning Laboratory training™ (SELL™) is structured to bring out the power that is already within each one of us. It is the kind of power that lets us look at life through our own eyes. That lets us deal with life and business on our terms.

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The training deals specifically with techniques that are critical to success:

- Organization and Time Management, which gives a way of measuring your progress precisely.
- Effective Prospecting Techniques
- Converting Leads Into Sales
- Probing-One-On-One Sessions With Clients
- Increased Closing Ratios
- Decision Shaping -- Structuring Presentations/Proposals

To tie it all together into a cohesive experience, participants will be asked to "role-play" the techniques they have learned. To achieve a sense of realism, successful Business representatives working with Quantum principles, will act as facilitators. By sharing their experiences, participants will get firsthand exposure in how to deal successfully with the varied situations they'll come across in their daily quest for more sales and listings.

Using the principle of commitment, we lead the participants to a Time Management System like you have never seen before. Its impact is to give you freedom to set and reach your goals, measure your progress and allow you to fully enjoy yourself when you work. By the same token, when you are not working you can enjoy that without reservation.

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S.E.L.L. Day 3 and Scientific Marketing™ - [Week 7]

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Meeting Three: [week 9]

What good things are happening?
Review Commitments (out loud)

Pre-Business Analysis review and generate the Business Plan
This will come after the Scientific Marketing™.

You will generate a business Plan for each of them from this data.
Challenge their thinking about what they spend their time on.

Get a commitment from each person to bring with them next session all their client information. This is for every person they have ever done business with, their Sphere of Influence and every person who ever expressed any interest in your potential Business.

Addresses, phone numbers, email, etc.

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Meeting Four: [week 11]

What good things are happening?
Review Commitments (out loud)

Making Data Meaningful

Getting the data into a format that can be used.
Creating a meaningful application of the CRM system that is easy to use and as automatic as possible.
Introduce a structured Marketing System for mailing to this database.

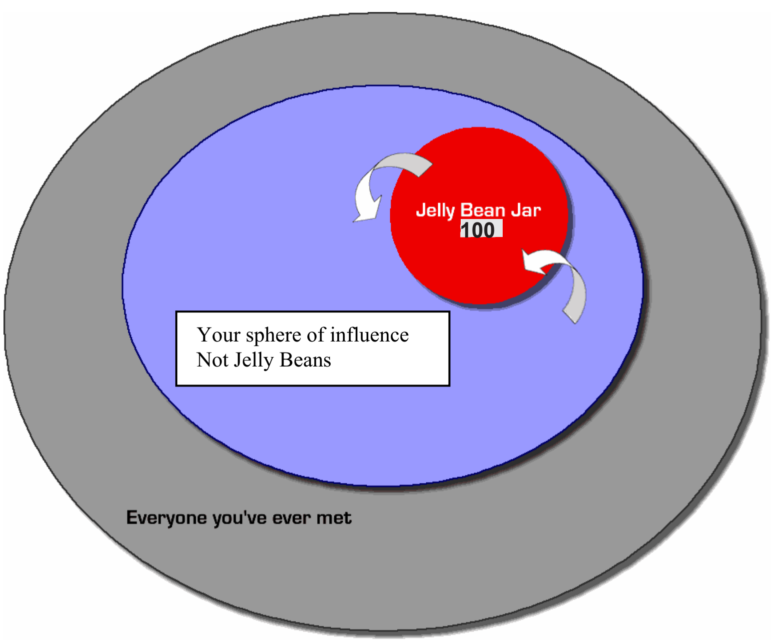
Review the Scientific Marketing protocols:

- Fixed in number (100 works)
- Permission from each person to keep in touch
- A monthly personal phone call (includes leaving a message)
- Purpose of the call is to find the ones who will never do business with you.
- As you delete Red ones you must add another more likely.

Commitment for next week (in addition to regular commitments)

- All the data will be in place.
- Bring your cell phones and lists with you.

Another view of the Jelly Bean Jar and contacting people:
You move people into your Jelly Bean Jar from your sphere and from the outside. It is a good idea to keep postcard contact with everyone on the Sphere of Influence ring, which includes the Jelly Bean Jar. This facilitates the accidental business that you can get from the casual relationships that are not identified as Jelly Bean Jar.



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Meeting Five: [week 13]

Shaping
Read and debrief the commitments.

Scripts and memorization

Schedule a call night or day.
Get commitments to attendance.
Review the Scientific Marketing protocols again. Either:

1. Look at how many they each have in their Jelly Bean Jar.
   What is it going to take to get to 100?
   How many do you need to add per week? (5 works nicely)
   Get a commitment to adding 3.

2. If they have in the vicinity of 100,
   Get a commitment to calling 25 every week.
   Making sure they have explicit permission to call each month.

Practice the permission scripts together. Then each person makes at least one live call with their partner giving them feedback.

Get solid commitments to Jelly Bean Jar activities.
Including sending a postcard reminder to the Jelly Bean Jar every month.
If they really like mailing, sending a postcard to their SOI every couple of months is productive.

Get commitment to bring their PIN data and time schedules to next meeting.
We will be reviewing that data.

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Quantum Committing Communication™ [Week 15]

Also known as Probing, this is an intense, skill-based training.

Your representatives will be certified in the use of the technology of Committing Communication™. You do not have to be a psychic or highly intuitive in order to help your clients understand their own needs and how that relates to their business. It is a process that engenders trust and relationship.

The skill they will learn is a by-the-numbers technique. It does not require any special telepathic insight or psychological background.

Every time a person buys anything, from a paper clip to a home, something has to happen in their mind. They must become clear on the benefit to them. This process is called crystallization.

Through the Probing process, the client can reach that place of understanding more powerfully and much quicker than by any other means. As they go through the process they realize the value of working with a representative who truly listens and helps them understand. A separate outcome is a bond of trust between the client and representative.

Their business needs training includes intellectual understanding of the process as well as the language, structure and intense practice until you become expert.

You will ask for a commitment to make probing appointments with their Jelly Bean Jar.

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Meeting Six: [week 17]

What good things are happening?
Review Commitments (out loud)

Follow up on the results of their Probing appointments. Make sure they are making these appointments…they lead directly to production and referrals.

Go over their I and P time with them.
By now they have several weeks of data to review and draw from.

Review prioritizing vs. AND logic.

> Prioritizing says that I couldn't because my ____(family, health, etc) was more important than ____(keeping in touch with contacts)
> AND logic says they are both equally important. There is a way to do both.

Do the discussion on having a system and driving that against hunting for your next contract.

> The Jelly Bean Jar is a system; doing some kind of prospecting event, hoping to meet your next client is deadly.
> Get them to talk about their own system for keeping in touch personally with their contacts to get business and referrals. How often do they talk with each one? How many are there?

The Business Planning will challenge their traditional thinking about where their business comes from and how to develop a system.

The time analysis will allow them to see they are creating their own slump by ignoring their contacts.

They will misinterpret the time spent. How long does it take a JB to mature? When did you first meet the client? Where? How many times did you interact with them before they were qualified and how much before they bought?
Some percentage of their contracts will come from their Jelly Bean Jar…or, whatever they've been calling it.
[Meaning they met them somewhere in some context, over time developed the relationship.]

Where and doing what do you spend your time?
They need more P-time.
What can you do to get more P-time?

Have them come up with just one commitment that will drive them to more P-time.

This meeting may take two weeks to complete.

Date

Training Notes

QUANTUM MANAGEMENT SYSTEMS

Meeting Seven: [week 19]

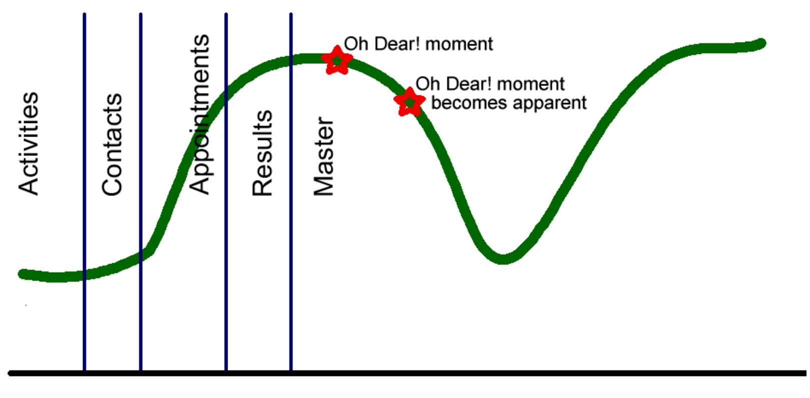
What good things are happening?
Review Commitments (out loud)

Wrap up

Discussion about what happened?
What are they doing differently?
What do they want to do for the future?
What can they do to hold onto their momentum?

Setting them into smaller groups of 2-3 afterwards to continue their work and create accountability. They often meet for months to hold one another accountable and review their Business Plan.

Talk about the Slump Curve



Give them the housekeeping page [how to create accountability language] to assure they can create accountability respectfully.

They don't want to leave.

Ask them what they would tell an agent from another company about the coaching program. Would they be willing to invite people at other companies to join our office and participate? Why? What makes it important to build our office?