

# **QUANTUM MASTERS COACHING AND RECRUITING™**

## **Manager's Manual**



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By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Its: \_\_\_\_\_  
Date: \_\_\_\_\_

licensee  
By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Its: \_\_\_\_\_  
Date: \_\_\_\_\_



# RECRUITING



# Recruiting

## Overview

Take two weeks in your offices

Re-think every single thing you do- every marketing tool, support systems, etc- from the point of view of recruiting. ***Everything is about recruiting.***

Everything you deliver has to be first class. Even if your prospects choose out, their experience is Wow! That is a great company. Their experience is A+.

Slow down the recruiting process. The structure shows you the people in your own pipeline.

**Managers need 6 appointments per week.** In the beginning they are all meet and greet. When they work this system, they easily add 2 per month per manager.

## Battle of the “Stuff”

The battle is typified by Big Company vs. Big Company (i.e. Coldwell Banker vs. Prudential)

Each adds more stuff to their agent services and amenities:

- More advertising
- More marketing
- More online presence
- Bigger personal offices
- More staff
- Higher Commission splits
- And so on...

Finally it is all about the commission split. The other company can always beat you with stuff. When he goes out of business, another takes his place!

What kind of language do you use now when you recruit?

“Our stuff is better than their stuff!”

What if you were in the business of creating production by the agents rather than in providing them with stuff? How would your language and approach change?

Traditional way is to think about commission splits and paying for stuff rather than about making more money, doing more transactions in less time. If they are stuck on commissions, drop them.



## ***Recruiting agents to coaching is like Selling Consulting.***

1. Meet with the client/prospect
2. Survey his business and get permission to do an analysis
3. Do the in-depth analysis for free.
4. Present the issues and show them your solutions to solve those issues.

There are 5 steps/appointments to the recruiting process.

### ***1st Meeting***

Starbucks meet and greet.

Do the soft survey here.

“What we do is to help our agents be more productive.

I’d like to do an analysis of your business. If you like us and we have a fit, great. If not, that’s ok too. We’ll be working together over time and it will be my contribution.

[We get over 50% of the ones we do this for]

Set up a probing appointment.

See if you like them.

Tell them one thing you do is work with your people to become more productive. – Coaching!

We help them to make more money in less time.

[You need ownership of the coaching or this falls flat!]

You are trained by a national consulting firm in how to do this effectively.

“I’d be willing to do that for you.”

“If we like where this goes, I will write a formal proposal to you. I won’t try to “recruit” you, I won’t sell you about our firm.”

### ***2<sup>nd</sup> Meeting***

Probe them and do analysis.

This is a relationships probe and an analysis probe.

Use the form for analysis.

Start with info from the MLS.

Have them go through a source of business on their authentic data.

[There is a guy in Chicago that uses a push button analysis. Make it easy on yourself. You will be doing analyses a LOT.]

Often they have transactions not on the MLS. So this analysis is a draft. Go over it with them Get them to sign off on the thing. This gives you the ability to say come to the 3<sup>rd</sup> meeting with the analysis complete.



### **3<sup>rd</sup> Meeting:**

Show up with the complete analysis.  
Go over it in detail, making sure it is accurate.

### **4<sup>th</sup> Meeting**

Go over your conclusions. Here are the things you need  
Bring their personalized Business Plan to get to more money in less time.  
Show where the money and time are going and what the return on that investment is.

[Somewhere along this process they will realize that not even their own manager is doing this for them. You will have earned the right to present a proposal.

Have a really clear picture of whether or not you can make a difference in their production.

“I’d like to have you on our team. I’m 100% convinced I can help you get to where you want to be. Here’s what we do to make it happen for you. (Coaching)

“I’d like to make a proposal.. I will prepare it. We’ll get together one more time. I need you to be prepared at that meeting to make a decision. Either yes or no works for me.

What would you need from me to make a decision? (commission stuff, office, etc.)

### **5<sup>th</sup> Meeting**

Present the proposal.

This is Listing Presentation quality proposal.  
Every contact with you is classy. By contrast, everything else is mediocre.

Nothing in the proposal is for consumers. Evaluate the things you do from the view of what it does for the agent. How does it make them more productive?

Proposal says: You’re professional. We will treat you as such. You deserve to be treated like one.

Ask them to make a decision. You need to be ok with whatever they decide. You want them, even if they say “No” to go on to be recruiters for you.



# COACHING



# Coaching

## Who and how does the group get formed?

If you want a cohesive company then you want a mix from the offices.

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 offices.

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

## Who is a Master?

Level 1 [New or below office 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.

Level 2 [Veterans struggling with the change in the market]

These are the core agents. They produce enough to meet your office 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 tend to be focused on finding their next deal rather than on managing a business for the long term.

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

Level 3 [The top 10-20 percent of the office.]

Need balance, burnout-control and consistent income.

Not necessarily about more money.

Same number of hours gives 25% more money plus finding balance is the goal for 70-80% of these agents.



## **Logistics for Transaction Group Meetings**

Chairs are all in a circle; don't sit in the same place as last time. Use the same foundation as for the SELL. [see the appendix] They're comfortable with that environment.

You create a structured space and coaching operates better.

They have a higher regard for the coaching process and environment. It is less about the phones, eating etc. than about the dedicated and important space. Without it they don't show up and don't do the things they need to do. Over time, if they don't show up it means they don't have regard for it and are not getting value for the time spent.

Have an Admin person handle all the logistics.

Make sure the room is set up, any equipment is set up, the chairs are set up, all the copies are done, any printing that needs to be done. You want to walk into the room ready to go. You want it to look special to them as well. Make sure the room is tidy...no old papers or litter on the tables or on the floor. If it is a conference room, be sure the table is squeaky clean to start.

## **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. Generally it is balance. 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.



Several things will be absolutely required of them if you are to make a difference. They must commit to:

1. Keep track of their schedule, planned and actual
2. Keep track of their spending on everything Real Estate related
3. Make commitments to each area every week
4. Complete the Business Analysis
5. Participate

The business Analysis together with 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.

### **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: [Housekeeping in the Appendix]

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 \_\_\_\_\_.

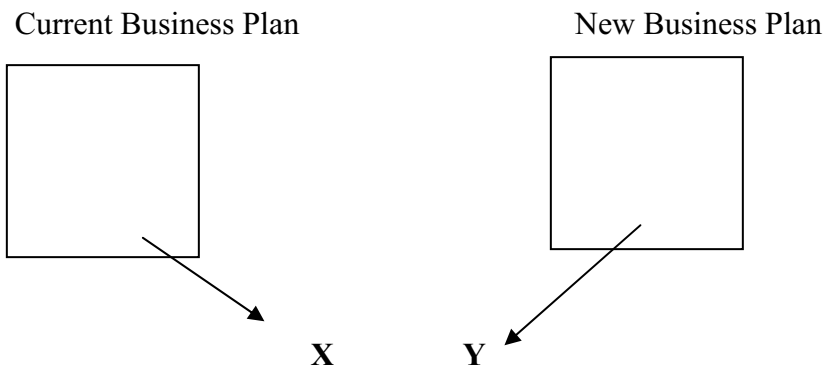
You can't be trusted to \_\_\_\_\_.

You should have done this. You shouldn't have done that.

Your problem is \_\_\_\_\_.

What's the matter with you?

**For Example:**



If current Vision is: I'm 48, overweight and out of shape

If the New one is I'm 48, in shape and perfect weight.

The new one generates commitments like Y: I go to the gym 3 times every week. That is consistent with my vision of "in shape"

At 5PM, I go to the gym after work. My Ex can't pick up the kids after school – I need to. Now I am faced with a choice. What do I do?

Can either not go to the gym, pick up the kids and blame the Ex.

Or – Find a way to do both. The AND logic.

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 vision.

“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.

Agents 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 time per week.

Vision: I am in the greatest shape ever and am at my perfect weight.

When they write their vision you can actually see the unconscious mind at work.

I am realizing my success

I will have financial security

Rather than:

I am successful

I weigh my perfect weight

I am financially secure

Think of the difference between I am having children and I have children.



Be able to say it out loud. The more active we are in demonstrating vision, the more we actualize it.

As we go, we start to change to the new vision. Then if disconnect, go back to the old one, we experience irritation with the old one. We develop a real feel for the new. It fits.

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!"



## **Meeting One:**

**Slow this meeting down. It is not an accountability meeting. I am a facilitator for their learning**

### **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 Foundation in the Appendix.

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, especially 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 may be dropped from the Transaction Group [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 of participate: "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 Coldwell Banker) 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 inspection on this meeting day? What if you have an escrow that is in trouble, etc. Start here learning to create solutions

### **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?

### **Pre-Business Plan Worksheet**



Hand it out. Go over it with them.

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***.

They will need to keep accurate track of every dollar they spend on Marketing and advertising.

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. **Bring them to every meeting, completed.**

List of books you recommend. Not required to read, just suggestions.



## **Coaching Meeting Two: [week 4]**

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 Business Analysis data**

This will come just after the S.E.L.L.™ 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 transactions done

Source of client (friend, past client, open house, floor 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?

Burnout is an issue for many people.

What does balance mean?

If a client who is 60 day from being able to write a contract insist on you taking him to look at houses today. Do you? Why?

Hand out Business Analysis Data sheet.

Commitment to have it completed by the Scientific Marketing day.



### ***Meeting Three [week 6]***

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.

Challenge what they spend money 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 Social and family circle, Every person who ever called on a sign, or walked into an open house, every person who ever expressed any interest in real estate.

Addresses, phone numbers, email, etc.



## ***Meeting Four: [week7]***

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 contact system that is easy to use and as automatic as possible.

Introduce the Impact Marketing System for mailing to this database.

Review the Scientific Marketing protocols:

- Fixed in number (200 works)
- Permission form 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.



## ***Meeting Five [week 8]***

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 200?  
How many do you need to add per week? (10 works nicely)  
Get a commitment to adding 10.
2. If they have in the vicinity of 200,  
Get a commitment to calling 50 every week.  
Making sure they have explicit permission to call each month.

Practice the permission scripts together. Then each person makes at least one 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 use of money.

Get commitment to bring their PIN data and time schedules to next meeting.

We will be reviewing that data.



## **Meeting Six [week 9]**

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

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 a discussion on having a system and driving that against hunting for your next deal.

The Jelly Bean Jar is a system; doing an open house hoping to meet your next buyer 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.

They believe marketing and advertising really work and are a good investment. The Business Analysis will show them evidence that it is not.

Making up marketing pieces that they think will drive business to them is comfortable. Calling their contacts and keeping in relationship is not comfortable.

The time analysis will allow them to see they are creating their own slump by ignoring their contacts. It is not the market and it is not the company advertising.

Put their information up on the screen and use a handout. Then go over it. Create a 20 minute discussion.

What do you see?

Spending time and money on marketing

Show an example of spending money and time in the wrong place.

Show them they can earn more money in a down market, spending a lot less.

Do they have an assistant? What does that person do? What is the return on that investment?

They will misinterpret the time spent. How long does it take a JB to mature? Where 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?

70% of their deals will come from their Jelly Bean Jar. Whatever they've been calling it.



[Meaning they met them somewhere in some context, over time developed the relationship till they bought or sold]

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.



## ***Meeting Seven [week 12]***

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 vision.

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?



## **Appendix**

**Script to get initial recruiting appointment**

**Questionnaire for meeting**

**How to do the Recruiting analysis**

**Sample Recruiting Proposal**

**Sample Recruiting Evaluation**

**Coaching Timeline**

**Coaching Timeline – Three Concurrent**

**Business Analysis – Details of Transactions**

**Business Analysis (The Past)**

**Business Plan (The Future)**

**Sample Coaching Foundation**

**Agent commitment to Times for Coaching**

**Commitment Worksheet**

**Table of weekly commitments and results**

**SMAART Commitments**

**Vision Management Language**

**Copy of Participant's License**



# RECRUITING CALL DIALOGUE

## Goal - Meet and Greet

Hi, this is \_\_\_\_\_ from \_\_\_\_\_, how are you?

I don't want to bother you right now, when would you have two minutes to talk to me on the phone?

I am the manager of the \_\_\_\_\_ office and I am touching bases with all the agents in our market to see how you are doing and to find out what kind of changes you are seeing in the market place.

We are colleagues as well as competitors and as professionals it is important to stay in touch and keep each other posted of changes that are occurring in the market, as to allow us to stay ahead of them.

### *(Make this relevant to your market.)*

- What are you seeing as happening in the market?
- I've noticed a slow down at broker tours, how about you?
- I just read some MLS stats that say there is a slow down on parts of \_\_\_\_\_, have you noticed anything in our market?
- Time on market appears to be getting longer/shorter, what have you noticed?
- Open house activity seems UP/DOWN, what have you noticed?
- What are your feelings about the market?
- What kind of changes have you been noticing in the MARKET/INDUSTRY/TOWN?
- We have noticed that calls to our Call Center have NOT dropped off at all, what have you noticed?

You K\_N\_O\_W, [drawn out] I really enjoyed talking to you, this has been great for me. I would really like to meet you. Since we are co-professionals in this business I'd like to meet you. When is a good time to get together?

I have some time (tomorrow, later in the week, next week), when is a good time?

I work off a tight schedule; let's get together at a time that works for you.

I am putting it into my calendar and writing it down. You can ABSOLUTELY count on me to be there, can I count on you?

### **[what time...which time...when...where...how soon]**

- 1- get permission
- 2- get them to start talking
- 3- transition
- 4- appointment
- 5- confirmation



# Evaluation and Analysis

For

---

(Name)

---

(Address)

---

(Office)

---

(Home Phone)

---

(Office Phone)

---

(Cell Phone)

---

(Fax Line)

---

(E-Mail Address)

---

(Birth Date)

**You understand that this meeting is to allow us to find ways to help understand one another and to help build business. I believe in building relationships and in my \_\_\_\_ years in the real estate business I have gotten a lot of satisfaction out of helping agents reach the next level in their business and it doesn't matter whether they are working for me or not. In our business we are colleagues as well as competitors, so what I can do to help you will come back to my office and me in good relationships in the future. What we talk about is strictly confidential and is strictly between you and I. So in order for us to determine whether or not we can build a relationship, I need to ask you a few questions. Some may feel personal or even make you a little uncomfortable. Is that going to be OK?**



**1. TELL ME WHAT YOU'VE BEEN DOING TO GENERATE BUSINESS?**  
**What? When? Where? Why? How? Anything else?**

**2. TELL ME HOW LONG HAVE YOU BEEN IN THE REAL ESTATE BUSINESS?**  
**With whom? How long? With any one else?**

**3. GIVE ME A SENSE OF HOW YOUR BUSINESS IS BROKEN DOWN IN THE LAST 12 MONTHS. Number of buyers versus number of sellers? Your average sales price? Where your business comes from? (i.e. floor calls, referrals etc.)**



4. **TELL ME WHAT YOUR IDEAL REAL ESTATE OFFICE WOULD LOOK LIKE?**  
What does that mean to you? Tell me more about that? What else?

5. **TELL ME WHAT YOUR RELATIONSHIP WITH YOUR MANAGER IS LIKE?**  
What does your company or manager mean to you?

6. **TELL ME WHY YOU LIKE THE \_\_\_\_\_ REAL ESTATE OFFICE? What**  
**are the main things you like about it?**



**7. TELL ME ABOUT YOUR BUSINESS PLAN? Do you follow it? Do you keep it up to date? How often do you review it?**

**8. TELL ME ABOUT YOUR MARKETING PLAN? How does it help you generate business? How much business does it help you generate? Anything else?**

**9. TELL ME, IS THERE ANYTHING YOU ARE CURRENTLY CONCERNED ABOUT?**



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**10. TELL ME THE ONE THING YOU WOULD LIKE TO ADD, TO THE WAY YOU DO YOUR BUSINESS?**

**11. TELL ME ABOUT WHAT YOU SPEND ON PERSONAL MARKETING? How do you track the results? How much do you spend? What percentage of your income is that?**

**12. TELL ME HOW YOU FEEL ABOUT COMPANY SPONSORED TRAINING?**



**13. GIVE ME A SENSE OF WHAT YOU THINK TODAY'S SALES ASSOCIATE WANTS FROM THEIR COMPANY?**

**14. WHAT DO YOU THINK FUTURE AGENTS WILL WANT?**

**This has been a very informative meeting for me. To get us to the next step, I would like to meet with you, again to discuss your business and analyze it with you. In order to do this there are a few simple questions you will need to think about and bring back the answers to our next meeting.**

**Can we go over them briefly and then set up our next get together?**



# Beginning Business Analysis for

---

1. Where would you like your business to be one year from now?

Three years from now?

Five years from now?

2. List everything you think you will need to get there.

3. If you accomplish your goals, what would it mean to you and your family?

4. What one thing, from the list of what you need is really critical to help you accomplish your goals?

5. May I have your permission to download your annual production numbers from the MLS in order to assist you to analyze your business? What is your MLS Number?

**THIS SURVEY IS HELD STRICTLY CONFIDENTIAL BY**

**\_\_\_\_\_ OF \_\_\_\_\_**  
**AND WILL NOT BE USED FOR BUSINESS ADVANTAGE NOR REVEALED TO ANY**  
**OTHER PERSON WITHOUT THE CONSENT OF THE PERSON, WHOSE NAME APPEARS**  
**AT THE TOP OF THIS SURVEY.**

\_\_\_\_\_  
**DATE** \_\_\_\_\_



# QUANTUM'S MASTERS™

## Business Plan Analysis Outline

1. List sales price of closed: highest to lowest price  
List source of each
2. List commissions closed: highest to lowest price  
List source of each
3. Total at bottom each set of numbers
4. Calculate 80% and 20% of each total
5. Calculate average sales price and average commission number
6. From highest to lowest, add up the sales price numbers and commission numbers to get to 80% or each total
7. Draw line on list where 80% of each is reached
8. Calculate average sales price and commission for top 80% and bottom 20%
9. Calculate difference between the 20% and 80% number as a % or 80% for average sales and average commission - what % increase in income?
10. Average commission numbers 80% and 20% divided by hours per client - time more valuable.
11. Average sales price 80% number times total number of sales. How much more income?
12. Total the source - # JBJ, # QHT, # OH, etc. Calculate each source as a percentage of total number of sources.
13. Calculate each source as a percentage of the 80% commission number
14. Total marketing expense \$\_\_\_\_\_.
  - How much money spent for JBJ growth? \$\_\_\_\_\_
  - How much money spent of general advertising? \$\_\_\_\_\_
  - Calculate each as a total of the percentage of total marketing expense.

Can we talk about your JBJ and business in general?

Test protocols. How many in, how often called and mailed?

“You can’t call and not improve your JBJ.”

Start with quantity, move toward quality.

Shift profile of JBJ over time.

A social network is the seed for a JBB

Refer lower values out - do not always let go.

Lower number of quality JBJ’s done well could be very productive.



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# A ROCK SOLID GUARANTEE: PEOPLE FIRST

November 7, 2001

PREPARED ESPECIALLY FOR: **Sharon Kessel**

PREPARED BY: **Dawn McAnaney, Broker-Manager**  
**Prudential Preferred Properties**

PRESIDENT: **Doug Yeaman, C.E.O. & President**  
**Prudentail Preferred Properties**



*Prudential Preferred Properties wishes to thank talented students,  
**Brett Kahren and Kellar Williams**, of New Trier High School  
for the architectural drawings that enhance this presentation.*

## BUSINESS DEVELOPMENT PLAN



# SIMPLY DEFINED RARELY ACHIEVED

## **Prudential Preferred Properties**

(pru-den´chul pre´ferd prop´er-tees.), noun.

It's a new idea in real estate.

**People First.**

It's a fresh approach to real estate competence.

**Zero tolerance for mediocrity.**

It's a focus on relationships.

**Our culture is committed to total honesty and integrity.**

It is not for everyone.

**We are highly selective — interested in quality, never quantity.**

It's a commitment to ongoing excellence.

**That is our promise to you.**

## **Prudential Preferred Properties' Agents**

(pru-den´chul pre´ferd prop´er-tees a´gents), noun.

**Respected.**

**Remarkably competent.**

**Empowered.**

You have been singled out for your professional integrity, your caring personality and your obvious ability to build lasting relationships. We invite you to join us.



# ONE ON ONE COACHING AND CAREER PLANNING

Prudential Preferred Properties is recognized in the Chicagoland real estate market as an innovator—providing a fresh approach to doing business with our agents and clients alike.

The President of Prudential Preferred Properties, Douglas M. Yeaman, leads our team. Doug is a nationally renowned management consultant and an inspirational and charismatic leader. He is known for his remarkable ability to motivate and train people within an organization; enabling them to achieve peak performance. He is the founder of Quantum Management and was approached by Prudential Realty to introduce to the Chicagoland area a radically different real estate culture. It was and is a culture that inspires people to grow and lead balanced lives. It is a culture that puts the people associated and affiliated with this company first - above all other considerations. It is a simple and straightforward approach, yet is unprecedented among the giant real estate companies in Chicagoland. It is an empowering concept for our members and is the secret to our overwhelming success.

Your manager and private coach has been highly trained to prepare you for incomparable success—leading you to the next level in your career with fresh, finely tuned skills and leadership advantages including:

- Constant communication
- A clear understanding of your business
- Personal attention to your specific needs and requirements for success
- Career planning and personal coaching
- Masters, Transaction and Action group programs
- The Journey to Mastery™ experience
- Cutting edge marketing programs
- Providing an environment where you are only doing the most productive activities - someone else is responsible for the details and the paper work

**Our focus is always on you.**

Our culture is all about you—as a whole person, not just as a real estate agent. We are interested in assisting you in achieving your business goals faster, with less effort and greater efficiency so that you have plenty of energy left for the rest of your life.



# ONE ON ONE COACHING AND CAREER PLANNING

## **Agent Services—“Your Personal Assistant”**

Our goal is to provide an environment in which our agents are busy working with clients, not busy doing administrative tasks.

You will enjoy the timesaving convenience of our Agent Services Center, a central point of contact where any agent, regardless of company can make an appointment to show any of your listings. We're making it easy to show your properties and therefore, your properties get shown more often.

The center manages all the details of making listing appointments including contacting you, the listing agent and the seller to arrange and confirm showings. This service is open 9 hours a day, 364 days a year—a service that no other real estate company in Chicagoland provides.

The Agent Services Center also tracks your showings and provides you a detailed report so that you can review your showing activity, adjust your marketing strategies with confidence and keep your seller constantly informed.

Agent services will also input your listing for you into all of the Prudential systems and into the MLS.

## **The Client Call Center—A Mature Approach to Generating Showings**

Buyer inquiries about your listings that are prompted by our ads and signs are always handled by a professional specifically trained to answer inquiries and convert those calls to appointments for your properties. We believe that floor time is a waste of your time and those valuable buyer calls that everyone has worked so hard to generate should always be given exceptional attention.

Based on a national survey, in a typical real estate environment, less than 2% of all calls into an office result in an appointment. We are excited and pleased to report that the team responsible for generating showings on your listings capture more than 80%! These numbers are unheard of in the industry. This means more showings of your listings, more exposure for your properties and more activity to report to your Sellers.

The Call Center is staffed 9 hours a day, 7 days a week, 364 days a year by a real person, not voice mail. We constantly monitor the effectiveness of the Call Center and know that you and your Sellers will be pleased with the remarkable results.



# ONE ON ONE COACHING AND CAREER PLANNING

## Scientific, Target Marketing

With the aid of sophisticated data mining tools, buyers for Prudential Preferred Properties' listings are pinpointed. Then we conduct an out-reach campaign of mailing and calling to see if a match can be made between the buyer and the property.

Your buyer clients will enjoy the benefits of **Prospector**, the latest technological innovation that delivers daily service from you. Once your buyer is entered into the Prospector system, everyday your cyber agent searches the entire MLS for properties that meet your client's criteria and delivers that pertinent information in the form of an email to your client. Using technology to maximize your time is an advantage you will enjoy as a Prudential Preferred Properties agent. Prospector does the leg work for you and your clients 24/7, every day of the year.

**Velocity Marketing** allows you to provide the most accurate pricing data to your Seller and gives you the ability to predict the market direction. You will be invited to spend an afternoon learning all of the secrets of Velocity Marketing. This system is governed by a formula that predicts the velocity at which property is appreciating and empowers you to provide your client with a "snapshot" of current market values and validate upcoming fast or slow markets. This system is trademarked and only available through a Prudential Preferred Properties agent.

Another preferred advantage and a first in the marketplace is the latest in property marketing—the **Property CD-ROM and web address**. Every property you represent has its own advantages and distinctive character. We think every property that we represent deserves a broad marketing strategy - marketing can no longer be limited to placing ads in newspapers. The Property CD-ROM and web address will showcase your listing and be direct mailed to targeted brokers in the marketplace who deal in the price range and location of your listing. These tools are a part of our advanced multi-tiered marketing approach that ensures that your listing is noticed and remembered by the real estate community—an important segment in any marketing plan. Other Property CD-ROMs may be targeted to potential buyers who are delighted with the interactive format, fresh approach and innovation. Your Sellers will enjoy results that maximize the exposure and impact of their properties in the marketplace.



# ADVANCED TECHNOLOGY MAXIMIZES YOUR VALUABLE TIME

## **A Hand-Picked, Experienced Team**

You will be part of a team of seasoned professionals who, like you, are dedicated to the highest standards, quality service and personal success. New associates are trained in a separate work environment and will enter the office only after completing rigorous instruction and a pre-determined number of transactions.

## **Handsome, Superbly-Equipped Offices**

The location and condition of the office in your market area is outstanding. Professionally planned and decorated for maximum impact and ease of use, your office is complete with multiple conference rooms, an overabundance of computers, a multi-functional copier that is also a printer, access to industrial color printers, handsome desks and every amenity an agent could desire.

## **Two Points of Contact Plus**

Communication is easy at Prudential Preferred Properties. Your manager is your first point of contact and you also have a secondary point of contact. However, if in any situation those two points of contact are not providing you with satisfaction or resolution, then you simply call the President of the company—Doug Yeaman. Doug says,

“The purpose of this system is to make communication in our company very simple. We are a bottom-up driven company and we are here to serve people. I don’t want bureaucracy. I need to know when things aren’t working.”

## **State of the Art Communications Systems**

Your personal voice mail, private fax number and email are all integrated into one system. Therefore, you can hear your email messages over the telephone or listen to your voice mail messages over the speakers in your computer. We are all about making your life simpler and better through technology.

## **[www.prupref.com](http://www.prupref.com)**

Our web site holds all of the company’s contracts, calendars, forms, training schedules, the company roster and your email. All of this is available to you at any hour, anywhere in the world.

## **CMA Technology**

A Prudential Preferred Properties Listing Presentation, Marketing Plan and CMA are splendidly designed, cutting-edge and completely prepared for you.

## **Your Empowering Advantages**



# ADVANCED TECHNOLOGY MAXIMIZES YOUR VALUABLE TIME

## **www.Your Personal Web Page.com**

A personal web page is essential in today's business. Technologically savvy Sellers and Buyers alike expect your arsenal of marketing tools to include web-based services and promotion. We will assist you in the set-up and management of your web page.

## **Networking**

Every desk is a virtual office with a docking station that allows your personal computer to network with all of the company systems. This gives you lightning fast access to the Internet, the MLS and printers.

## **Digital Cameras**

Digital cameras for agent use are available in every office.

## **Experienced Support Staff**

We take very seriously the important job of successfully supporting you and the functions of the office. Our administrative managers are not your average real estate office workers. They are technologically savvy, networked throughout the company and are interchangeable from office to office. Our systems are outstanding and our administrative staff will allow you to stay focused on your career path instead of your paperwork.

The Accounting and Closing Departments ensure your transactions proceed smoothly and commission checks are delivered within three days.

## **The Technology Department**

The Technology Department provides support for computers, our Internet presence and the integrated phone system. Their innovation and forward-thinking ideas maintain our lead in the industry.

## **The Marketing Department**

The Marketing Department is continually monitoring the effectiveness of our marketing strategies, communicating with our agents, clients and service providers and keeping our company in the forefront of leading-edge marketing —pioneering short and long-term tools for your ultimate success.

The Prestige Properties and Fine Homes Division corroborates with you to use our specialized marketing strategies to list, position and sell upper-tier and luxury properties.

## **Your Empowering Advantages**



# YOUR SMOOTH TRANSITIONAL STRATEGY

## Maintaining Your Client Base

Our experience has shown that agents in transition to Prudential Preferred Properties often increase their business. Why?

- **Your Agent Services representative** will telephone your entire client list within 24-hours, informing them of your new affiliation and asking them about their present real estate needs or that of others who might benefit from your expertise.
- **Your Transition Coordinator** will oversee all of the details to ensure a seamless transition including:
  - Business Cards
  - Name Riders
  - Enrollment in 401K
  - Process all state and board license forms
  - Create a personal profile for you
  - Handle press releases about your affiliation
  - Ensure your client database is set-up
  - Enroll you in PruDirect if you desire
  - Set-up your personal web page
- **Your North Shore or City Marketing Specialist** will supervise the production of:
  - Brochures for your listings
  - Templates for personalization of your CMAs
  - Final CMAs for presentations
- **Prudential Preferred Properties** distinguishes itself from all other real estate companies with our steadfast commitment to “People First.” You are the most important part of our cutting edge approach to this business. Because we are a privately owned company, we can provide **Company Support** in a personal way. We recommend the following extraordinary coaching sessions. You will be amazed by their application in your already successful business.

**S.E.L.L.**<sup>™</sup> is a focus on time management and business development unlike any other. **Probing** is a focus on communication skills and creating key relationships for the success of your business. **The Quantum Home Tour**<sup>™</sup> is a proprietary licensed marketing event. Your certification in this program is a valuable tool in your personal success and development. **The Mastery Program** takes your career to the highest level. The focus is on leading a balanced life while maintaining optimum production.



# BUSINESS DEVELOPMENT PLAN FOR SHARON KESSEL

**Commission Agreement:** We recognize your contribution to the success of our business. Therefore, your commission rate will start at 75% of gross commission. In the event your 12-month averaged earnings increase in accordance with our published commission schedule, then your split will be increased accordingly. Your commission earnings from your former company will be applied to the PPP schedule for eligibility purposes. This guarantee will continue through 12-31-2003.

**Compensation for loss:** In the unfortunate event that CBRB penalizes any of your commissions by lowering your commission split or imposing any other financial penalty because of your transition, then Prudential Preferred Properties will compensate you dollar for dollar.

**Personal Marketing:** We believe in your success and would like to provide to you the following:

- To assist in creating, defining and managing a partnership arrangement with a qualified agent that would at your discretion allow you to redistribute your bottom 1/3 transactions.
- Include you in our exclusive North Shore upper-tier marketing and networking team which will increase your exposure to obtaining and marketing Prestige Properties.
- Marketing of your listings to North Shore and Chicago agents and clients via CD-ROM technology on all of your listings.
- Redesign and hosting of your personal Web site at our expense for a period of one year.
- To facilitate your National Prudential Network opportunities, we would like to provide a package to the 2001 Business Convention in New Orleans.
- A personal photo shoot with color and black and white prints if needed.
- Five open house signs and 10 name riders.
- Software for management of your "Jelly Bean Jar" contacts.
- Post Cards provided you participate in the Jelly Bean Jar Workshop and develop a group of 200 people who agree to be part of his group. We will provide to you at our expense, 200 post cards for 12 months. The establishment of this group must be complete within 2 months of your association to qualify.

## Miscellaneous:

- We will pay for all State & Board transfer fees.
- We will provide E&O insurance for you until renewal date of 4/1/2003.
- We will pay for your office voice mail, integrated fax and Internet systems.

**This offer is predicated on the presumption that your affiliation with Prudential Preferred Properties will be no later than November 19th, when this offer will expire.**



# BUSINESS DEVELOPMENT PLAN FOR SHARON KESSEL

**You agree to drive your business to the highest level by committing to the following:**

- Complete S.E.L.L., Quantum Home Tour, Probing and Lead Management within your first year of affiliation with us.
- Provide your expertise and assistance as we continue to build our team.

**It is in the best interest of all parties that the terms of this agreement be deemed confidential between you and the company. Therefore, your signature below indicates your promise to keep this offer completely confidential.**

Your Signature:

---

Sharon Kessel

---

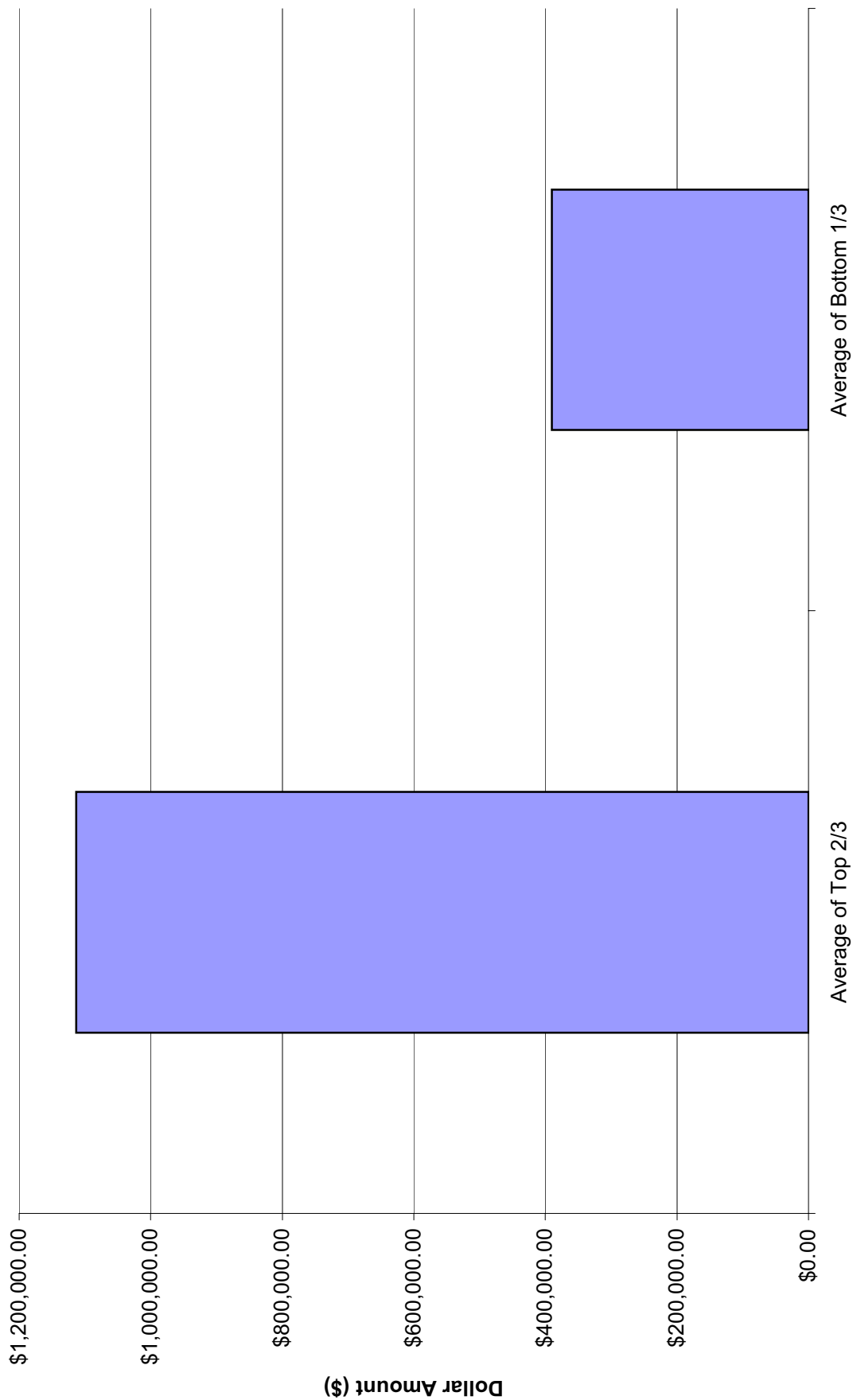
Dawn McAnaney, Broker-Manager



	Transaction Price	Average Transaction Price	Median Transaction Price	Deals Comprising Top 2/3 of Transactions	Average Transaction Price for Top 2/3
Transactions - 2002	\$19,600,750.00	\$700,026.79	\$482,000.00	12	\$1,113,104.17
Transactions - 2003	\$4,662,000.00	\$582,750.00	\$585,000.00	5	\$668,600.00

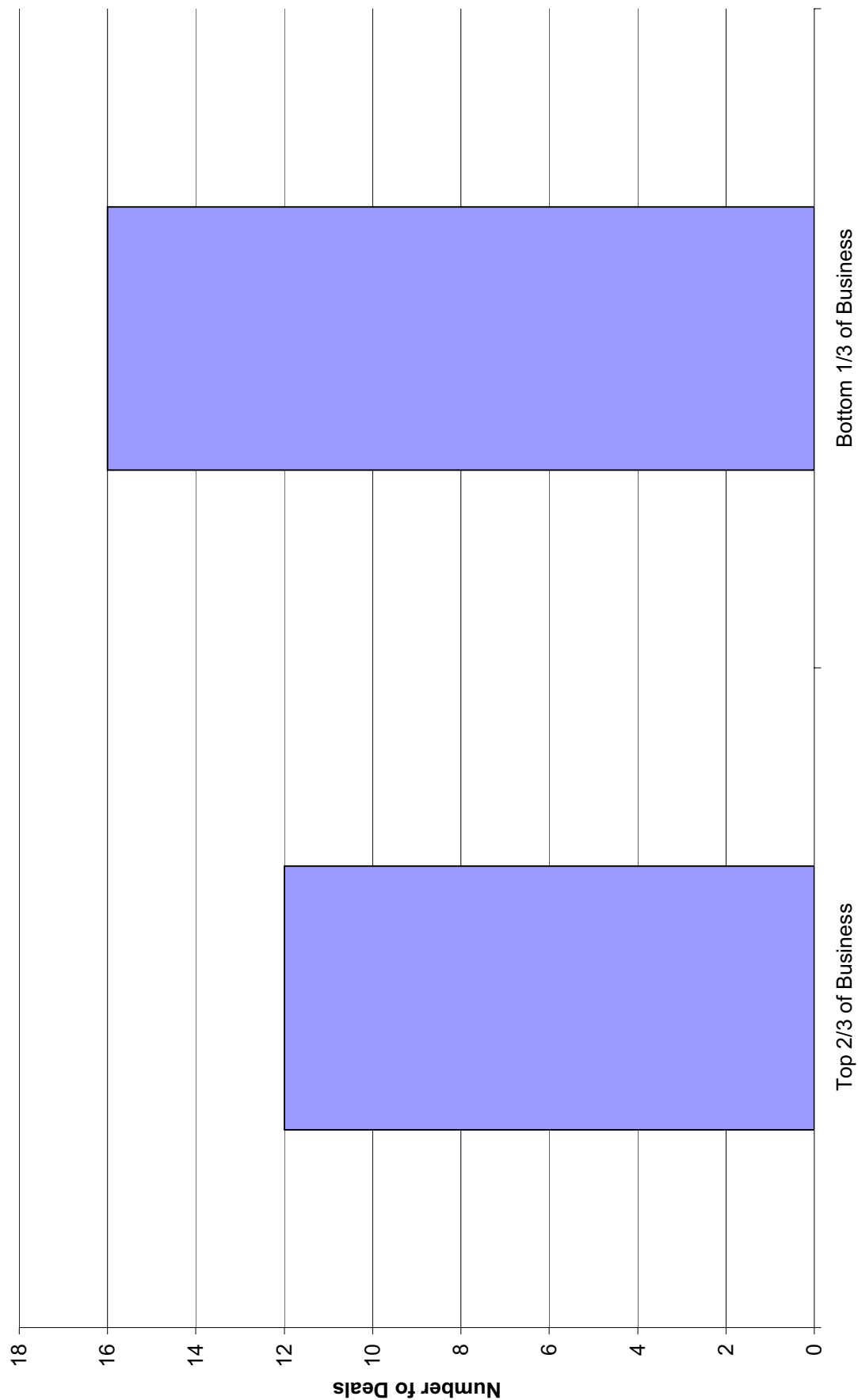


## Transactions - 2002 Percentile Average Transactions



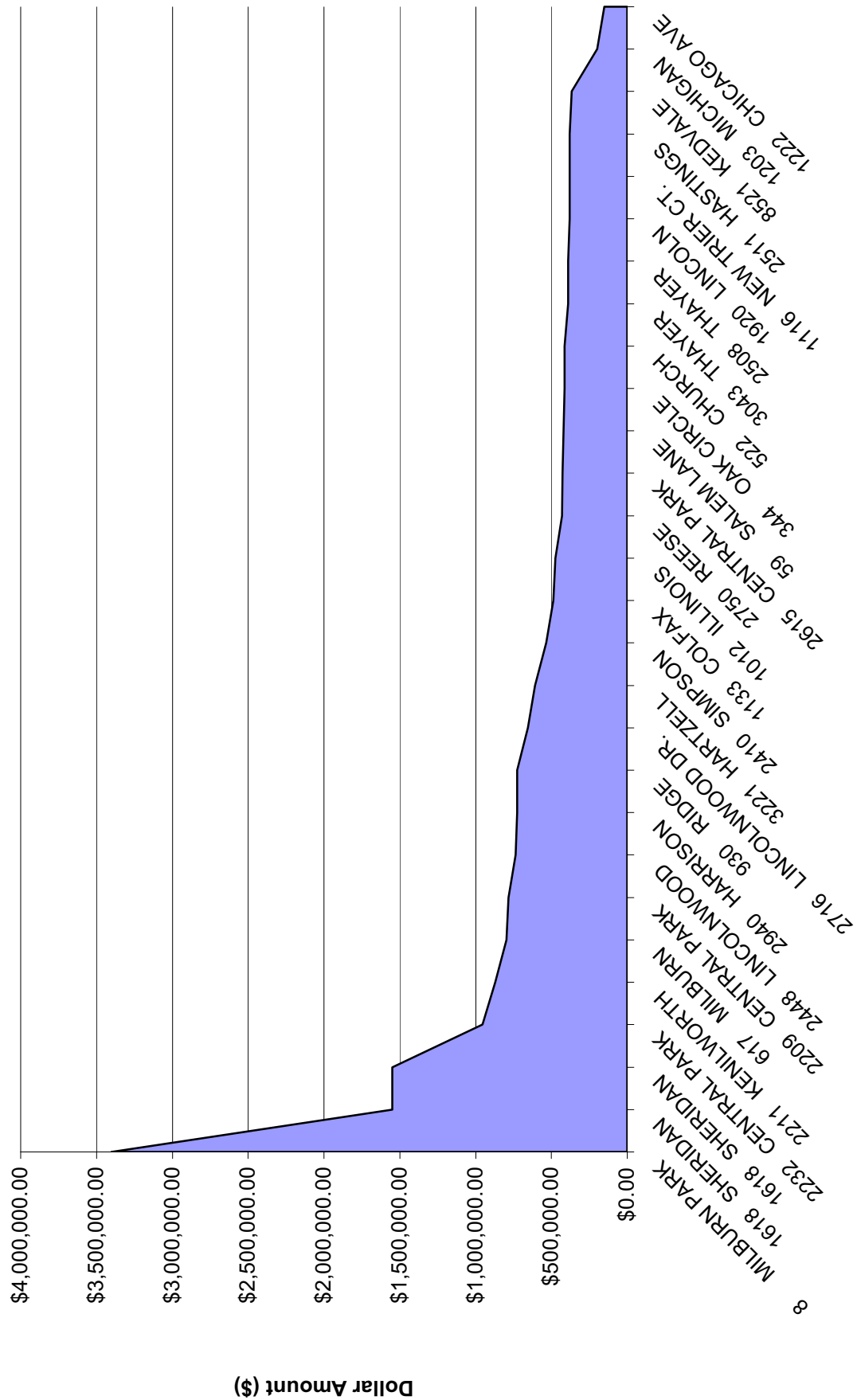


## Transactions - 2002 Percentile Deals





## Transactions - 2002 Transaction Amounts



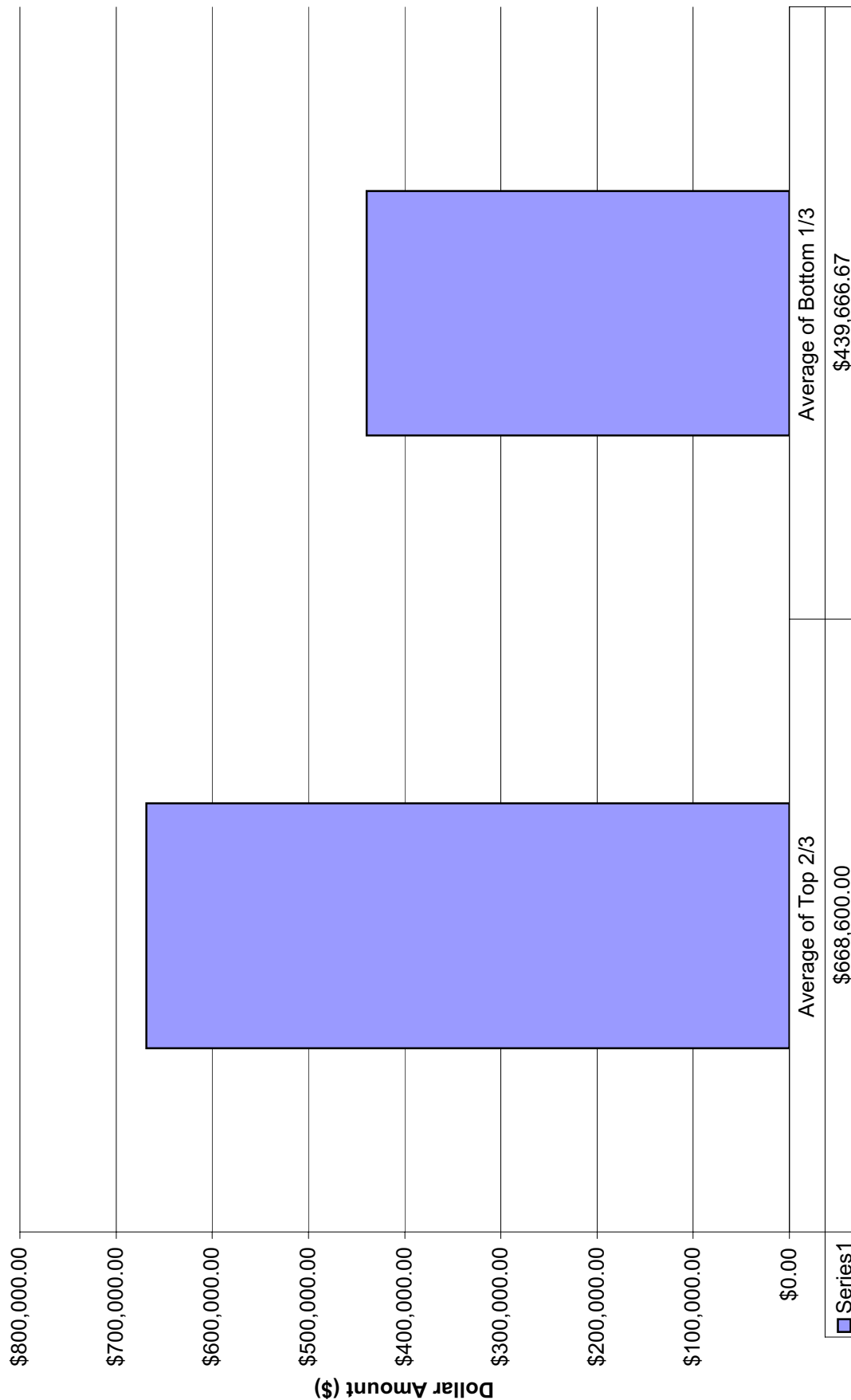


Closed Date	Address	City	Listing Price	Sale Price	Status	Market Time	Agent Na Agent ID	Sale Percentage (%)	Referral Source
8/2/2002	8 MILBURN PARK	EVANSTON	\$3,500,000.00	\$3,400,000.00	CLSD	1	1	17.35	Referral
9/27/2002	1618 SHERIDAN	WILMETTE	\$1,825,000.00	\$1,550,000.00	CLSD	169		7.91	Sphere
9/27/2002	1618 SHERIDAN	WILMETTE	\$1,825,000.00	\$1,550,000.00	CLSD	169		7.91	Sphere
11/25/2002	2232 CENTRAL PARK	EVANSTON	\$1,050,000.00	\$955,000.00	CLSD	223		4.87	Sphere
8/23/2002	2211 KENILWORTH	WILMETTE	\$895,000.00	\$870,000.00	CLSD	36		4.44	Sphere
10/28/2002	617 MILBURN	EVANSTON	\$835,000.00	\$795,000.00	CLSD	70		4.06	Referral
6/10/2002	2209 CENTRAL PARK	EVANSTON	\$799,500.00	\$783,750.00	CLSD	52		4.00	Referral
7/30/2002	2448 LINCOLNWOOD	EVANSTON	\$765,000.00	\$737,500.00	CLSD	32		3.76	Sphere
9/16/2002	2940 HARRISON	EVANSTON	\$739,000.00	\$725,000.00	CLSD	121		3.70	Referral
12/6/2002	930 RIDGE	EVANSTON	\$755,000.00	\$725,000.00	CLSD	76		3.70	Sphere
12/5/2002	2716 LINCOLNWOOD DR.	EVANSTON	\$665,000.00	\$656,000.00	CLSD	76		3.35	Sphere
7/8/2002	3221 HARTZELL	EVANSTON	\$629,000.00	\$610,000.00	CLSD	41		3.11	Sphere
10/23/2002	2410 SIMPSON	EVANSTON	\$569,000.00	\$536,000.00	CLSD	118		2.73	Sign Call
10/11/2002	1133 COLFAX	EVANSTON	\$509,000.00	\$489,000.00	CLSD	104		2.49	Sign Call
8/30/2002	1012 ILLINOIS	WILMETTE	\$479,000.00	\$475,000.00	CLSD	40		2.42	Sign Call
10/29/2002	2750 REESE	EVANSTON	\$449,000.00	\$430,000.00	CLSD	118		2.19	Personal Advertising
9/17/2002	2615 CENTRAL PARK	EVANSTON	\$445,000.00	\$427,500.00	CLSD	50		2.18	Personal Advertising
10/31/2002	59 SALEM LANE	EVANSTON	\$424,900.00	\$420,000.00	CLSD	64		2.14	Personal Advertising
5/30/2002	344 OAK CIRCLE	WILMETTE	\$435,000.00	\$415,000.00	CLSD	36		2.12	Personal Advertising
7/30/2002	522 CHURCH	EVANSTON	\$450,000.00	\$415,000.00	CLSD	145		2.12	Personal Advertising
8/23/2002	3043 THAYER	EVANSTON	\$389,000.00	\$389,000.00	CLSD	38		1.98	Sphere
9/9/2002	2508 THAYER	EVANSTON	\$359,000.00	\$389,000.00	CLSD	1		1.98	Sphere
8/29/2002	1920 LINCOLN	EVANSTON	\$385,000.00	\$381,000.00	CLSD	89		1.94	Sphere
9/26/2002	1116 NEW TRIER CT.	WILMETTE	\$389,000.00	\$381,000.00	CLSD	33		1.94	Sphere
8/23/2002	2511 HASTINGS	EVANSTON	\$395,000.00	\$380,000.00	CLSD	99		1.94	Sphere
11/25/2002	8521 KEDVALE	SKOKIE	\$374,500.00	\$366,000.00	CLSD	48		1.87	Sphere
7/1/2002	1203 MICHIGAN	EVANSTON	\$199,000.00	\$199,000.00	CLSD	38		1.02	Referral
6/19/2002	1222 CHICAGO AVE	EVANSTON	\$157,000.00	\$151,000.00	CLSD	46		0.77	Referral
Total Transaction				\$19,600,750.00					
Average Transaction				\$700,026.79					
Median Price				\$482,000.00					
Top 2/3 of Business				12					
Average of Top 2/3				\$1,113,104.17					
Bottom 1/3 of Business				16					
Average of Bottom 1/3				\$390,218.75					



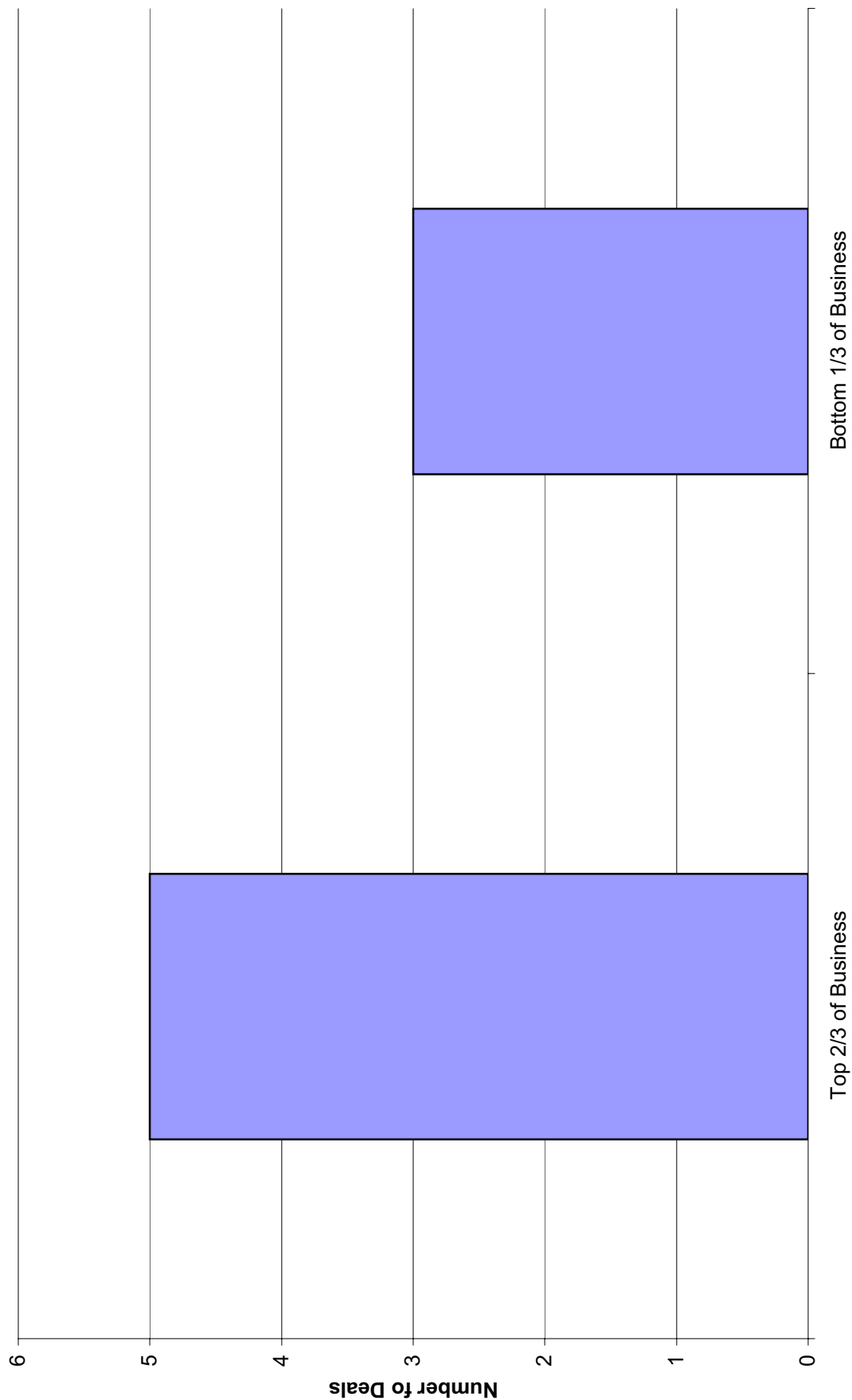


## Transactions - 2003 Percentile Average Transactions





## Transactions - 2003 Percentile Deals

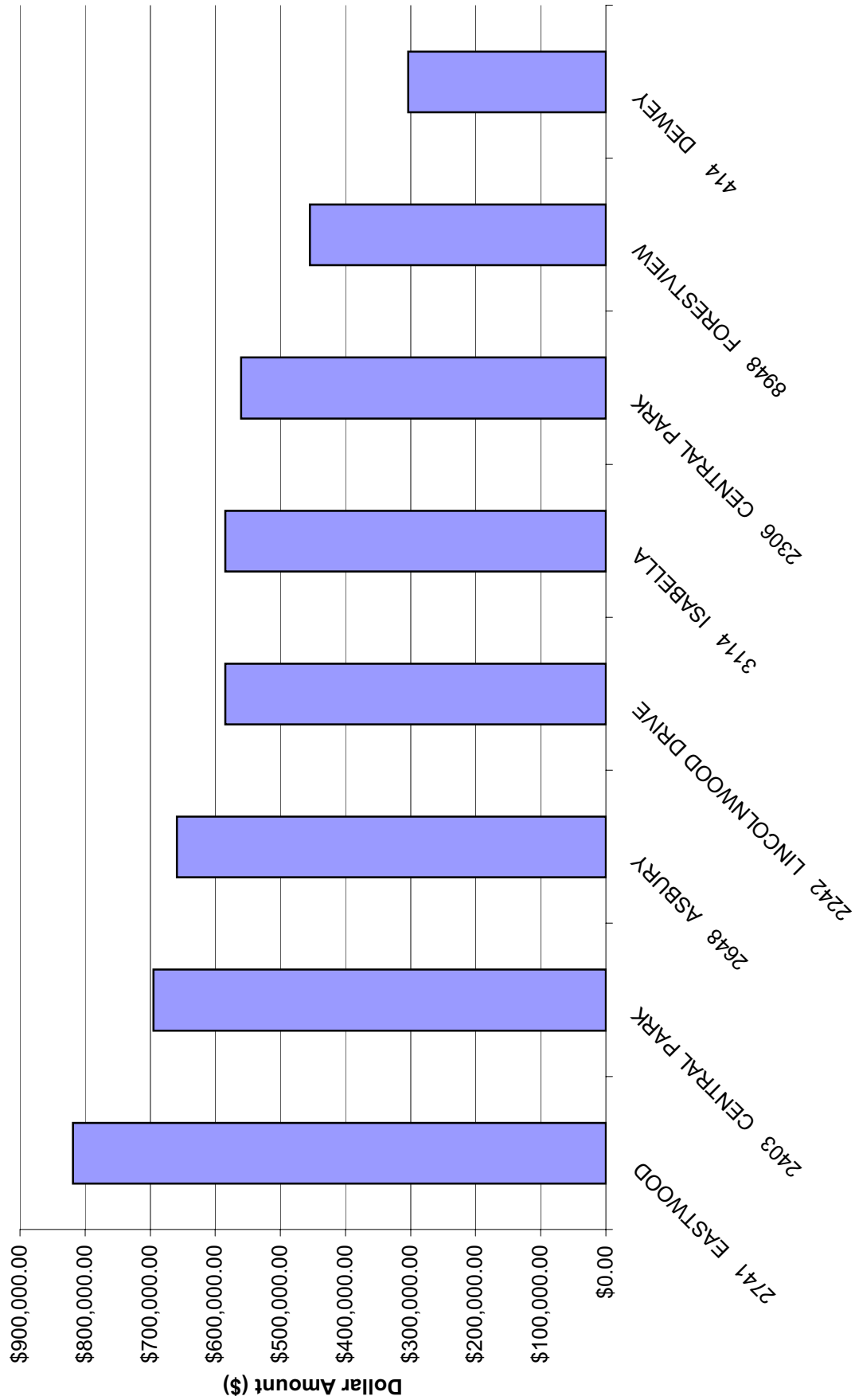


Prudential Preferred Properties

7/17/2007



# Transactions - 2003 Transaction Amounts





Closed Date	Address	City	Listing Price	Sale Price	Status	Market Time	Agent Name	Agent ID	Sale Percentage (%)	Referral Source
1/30/2003	2741 EASTWOOD	EVANSTON	\$859,000.00	\$819,000.00	CLSD	54			17.57	Sphere
4/25/2003	2403 CENTRAL PARK	EVANSTON	\$709,000.00	\$695,000.00	CLSD	52			14.91	Sphere
3/25/2003	2648 ASBURY	EVANSTON	\$669,000.00	\$659,000.00	CLSD	72			14.14	Sphere
3/28/2003	2242 LINCOLNWOOD DRIVE	EVANSTON	\$615,000.00	\$585,000.00	CLSD	109			12.55	Sphere
4/28/2003	3114 ISABELLA	EVANSTON	\$614,000.00	\$585,000.00	CLSD	71			12.55	Personal Ad
3/7/2003	2306 CENTRAL PARK	EVANSTON	\$589,000.00	\$560,000.00	CLSD	203			12.01	Sphere
3/14/2003	8948 FORESTVIEW	EVANSTON	\$479,000.00	\$455,000.00	CLSD	198			9.76	Referral
3/14/2003	414 DEWEY	EVANSTON	\$329,000.00	\$304,000.00	CLSD	127			6.52	Referral
			Total Transaction	\$4,662,000.00						
			Average Transaction	\$582,750.00						
			Median Price	\$585,000.00						
			Top 2/3 of Business	5						
			Average of Top 2/3	\$668,600.00						
			Bottom 1/3 of Business	3						
			Average of Bottom 1/3	\$439,666.67						



# Timeline

## Workshop Timeline:

Every workshop will follow approximately this time line:

Begin:

Shaping: What's working and what do you need help with?

Commitments Debrief their commitments - -Keep it brief.

Commitments to the workshop (i.e. data collection, Business Analysis, cell phone etc.

Material to be presented

Commitments for next session

End



**Coaching Timeline:** (yellow = Coaching session an DVD)

<b>Wk</b>	<b>Coaching <i>For Agents</i></b>	<b>Recruiting <i>For Managers</i></b>	<b>Need on DVD</b>
-1	Invitations go out to the appropriate agents for Transaction Group	Install and learn Real Data Strategies database system, Collect the agents appropriate for recruiting	<b>Trainer: Instructions in Work Book</b>
0	Orientation – 1½ - 2 hours (On DVD) Interactive with Manager and DVD Who wants to commit? Make appointments with the ones who say yes. Invite them to second interview.	Phone Call to Coach Have meetings with candidates. Select the group. (More than # needed.) Go over the needed commitments to time. Do RDS data for selected agents	<b>Trainer:</b> <b>Either use the DVD or do it live.</b>  <b>Orientation on DVD for use by Manager.</b>
1	Coaching Workshop 1 – 1 to 2 hrs Commitment to coaching series. Everyone commits to the timeline. Foundation for group Hand out Business Analysis Commitments to collecting the data	Phone Call to coach Have prepared Business Analysis sheets for Selected Agents to be used at SELL with their permission	<b>Trainer instructions on foundation.</b> <b>Agent:</b> <b>Foundation License</b> <b>This is Your Training</b>
2	<b>SELL I and II</b> Hold Agents accountable for supplying data on Transactions.	Attends SELL Meeting with QMS Coach. Recruiting scripts Practice Review doing Business Analysis for recruiting.	
3	<b>SELL III</b> Sample Business Analysis for 2-3 people at training Demo #/Source, income/Source, Volume/Source	Attends SELL Meeting with Trainer Starts Making Coffee meetings with Trainer	



4	Coaching Workshop 2 – 2 hours Manager does analysis on people who were not done at SELL Get commitment to collect SOI/Past Clients/leads names, email, address, phone, etc data Commitments to the Time management learned in SELL.	Phone call to coach re recruiting calls made. Review using RDS data and Business Analysis for recruiting.	<b>Trainer: instructions on doing the Analysis</b> <b>What the Analysis means</b> Agents: What it means to you What to look for. Excel spreadsheets
5	<b>Scientific Marketing</b> Use the Business Analysis data generated	Meeting with Trainer Debrief Coffee meetings Look over Business Analysis for recruiting for prospects. Review scripts.	
6	Coaching Workshop 3 – 2 hours Generate Business Plan for each person. Based on Scientific marketing and Business analysis. Get commitment to bring client information, including contact and address.	Phone call to coach	<b>Trainer: instructions</b> <b>How to generate the business plan.</b> <b>How to ask for the right commitments</b> Agents: Review the protocols for Jelly Bean Jar Introduce IMS system
7	Coaching Workshop 4 – 2 hours Making Data Meaningful Get the data into a format so that it can be sent, contacted, etc. Introduce Impact Marketing function...Website Commitment to data in place by next session. Bring cell phone and data to next session.	Phone Call to coach	<b>Trainer: Using IMS</b> Agents: Review of Scientific Marketing principles for Veterans.
8	Coaching Workshop 5 – 2 hours Scripts Practice and memorization Schedule a call night. Get Commitments to attendance. Review of S. M.: Red vs Green, protocols, using it in Business Plan. Commitment to a number of calls to Jelly Bean Jar for permission. -Or (if not enough JB) Add 10 to JBJ /call what there is. Commitments to BP actions.	Phone call to coach	<b>Trainer: Further review of Scientific Marketing for use by veterans</b> <b>What kinds of commitments you are looking for.</b>  Agents: Further review



9	Coaching Workshop 6 – 1 hours Accountability for calls made and JB added  Pin Analysis for past weeks	Phone call to coach	Trainer: Review accountability language Agents: Review PIN Prioritizing vs. AND thinking.
11	<b>Committing Communications™</b> Probing/Consultation Training (3 days)	Meet with coach	
12	Coaching Workshop 7 - 1 hour Wrap up Discussion about changes Team up with partner.	Phone call to coach	Trainer: creating closure, wrap up, inspiration. Partnerships in accountability Get referrals to OB agents for office



## Timeline for Coaches Three concurrent sessions

Week Number:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
One	Two	M-Tu SELL 1&2	M-Tu SELL 3&\$	Three	Four	Five	W-Fr Probe 1&2&3	Six	Seven			W-Fr Probe 1&2&3	Six	Seven					
					One	Two	M-Tu SELL 1&2	M-Tu SELL 3&\$	Three	Four	Five	M-Tu SELL 1&2	M-Tu SELL 3&\$	Three	Four	Five	W-Fr Probe 1&2&3	Six	Seven
make Recruit appts	1st	2nd	3rd	4th	5th		Recruits Join office			Recruits start coach-3	Two						Certify PROBE	a Trainer	







# Quantum Masters Coaching™

## Listing Taken

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

Property Address	Date Sold	Date Exp/ Off Mkt	Reason it didn't Sell or Price it sold for.

Number Listing Taken

Number Listings Sold

% Listing Sold (Line 2 ÷ Line 1) \_\_\_\_\_

Total Dollar Volume of Listing Sold; \_\_\_\_\_



### Transaction Detail

## Sources of Business for Closed Transactions

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

[illegible]

Enter Totals for the following Categories:

Geo Farm	_____	Past Client	_____
FSBO	_____	Advertising	_____
Open House	_____	QHT™	_____
Relo referral	_____	Relative	_____
Floor Time	_____	Friend	_____
Expired (OB)	_____	Other	_____
Internet	_____	OB referral	_____
Jelly Bean Jar	_____	Other	_____



# Expense Analysis

## Quantum Masters Coaching™

### BUSINESS ANALYSIS

### Marketing Expenses

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

	Past 12 months	Plan next 12 months
1 Newspapers Ads		
2 Magazine Ads		
3 Yellow Pages		
4 TV/Radio		
5 Direct Mail		
6 Church/ Club Directories		
7 Promotional flyers		
8 Postage		
9 Yard Signs/ Riders		
10 Photography		
11 Marketing Tools		
12 Personalized Marketing tools		
13 Open House supplies		
14 Other		
15		
16		
17		
<b>TOTAL MARKETING EXPENSES:</b>		



# Expense Analysis

## Quantum Masters Coaching™

### BUSINESS ANALYSIS

#### Business Expenses Analysis

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

**Total Commission Income (1099)** \$ \_\_\_\_\_

Expenses:

Marketing: \$ \_\_\_\_\_

Business: \$ \_\_\_\_\_

**Total Expenses** \$ \_\_\_\_\_

**Profit (loss)** \$ \_\_\_\_\_

(Subtract Expenses from Income)

What % of your income is invested back into your business: \_\_\_\_\_ %

What % of your income is invested in Personal Marketing: \_\_\_\_\_ %

What are your opportunities for improving effectiveness?



# Expense Analysis

## Quantum Masters Coaching™

### BUSINESS ANALYSIS

### Non-Marketing Business Expenses

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

	Past 12 months	Plan next 12 months
1 Auto (Lease/loan payment)		
2 Auto Expenses (gas maintenance)		
3 Auto Insurance		
4 E&O Insurance		
5 Dues (Realtor Assn, clubs, etc)		
6 MLS		
7 Professional books and tape		
8 Phone		
9 Office Supplies		
10 Equipment (Fax, software, copier)		
11 Computer Hardware 7Maintenance		
12 Seminars		
13 Lock Boxes		
14 Professional Services (Acct/Atty)		
15 Secretarial/Personal assistant		
16 Transaction Coordinator		
17 Sales Conference		
18 Licenses		
19 Gifts		
20 Business magazines		
21 Entertainment		
22		
23		
TOTAL BUSINESS EXPENSES:		



# Production Analysis

## Quantum Masters Coaching™

### BUSINESS ANALYSIS

### Production Analysis

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

1. Total Commission Income Earned \_\_\_\_\_

#### LISTING SIDE

2. Number of Listings taken \_\_\_\_\_

3. Number of Listings sold \_\_\_\_\_

4. % of Listings sold (Line 3 ÷ Line 2) \_\_\_\_\_

5. Total Volume of Listings Sold \_\_\_\_\_

6. Average Sales Price (Line 5 ÷ Line 3) \_\_\_\_\_

#### BUYER CONTROLLED SALES

7. Number of Buyer sales \_\_\_\_\_

8. Total Volume of BCS \_\_\_\_\_

9. Average Sales Price of the BCS (Line 8 ÷ Line 7) \_\_\_\_\_

#### UNIT TOTALS

10. Number of Listings Sold \_\_\_\_\_

11. Number BCS \_\_\_\_\_

12. Total Closed \_\_\_\_\_

#### AVERAGE INCOME PER UNIT

13. Total Commission Earned (Line 1) \_\_\_\_\_

14. Total Closed Units (Line 12) \_\_\_\_\_

15. Average Commission Earned per Unit ((Line 13 ÷ Line 14) \_\_\_\_\_

16. % business from Listings Sold (Line 3 ÷ Line 4) \_\_\_\_\_

17. % Business from BCS (Line 7 ÷ Line 14) \_\_\_\_\_



# Summary Analysis

For: \_\_\_\_\_

12 months ending: \_\_\_\_\_

## Coaching Business Analysis

1 How much TOTAL income did you make in the last 12 months? (your 1099) \$

\_\_\_\_\_

2 How much commission income from CLOSED Transactions did you receive? \$

\_\_\_\_\_

3 How much in referral income (\$) did you receive? \$

\_\_\_\_\_

4 How much in other business related income did you receive? \$

\_\_\_\_\_

5 How many transactions you **OPENED** in the last 12 months? #

\_\_\_\_\_

6 Calculate or estimate as accurately as possible the total number of transaction that fell out. #

\_\_\_\_\_

7 How many **CLOSED** transactions in the past 12 months #

\_\_\_\_\_

8 Calculate the average value per **Opened** transaction to you. (total income ÷ total # of **Opened** transactions: Line 2 ÷ Line 5) \$

\_\_\_\_\_



For: \_\_\_\_\_

12 months ending: \_\_\_\_\_

## Coaching Business Analysis

- 9 Calculate the average value per **Closed** transaction to you. (total income ÷ total # of **Closed** transactions: Line 2 ÷ Line 7) #

- 10 Calculate or estimate as accurately as possible the total number of clients you **worked** with to close these transactions. (Not just deals fell through, but clients who didn't buy + client's who bought =total) #

List and identify all sources of marketing expenses related to your business.

Company Name		Amount Spent
		\$
		\$
11		\$
		\$
		\$
		\$
		\$
		\$
12	<b>Total:</b>	\$

- 13 Calculate the Average marketing cost of each transaction: Line 11 ÷ Line 7 \$

- 14 Calculate or estimate as accurately as possible the total hours spent creating, managing and developing the marketing program.



Coaching Business Analysis

15 Calculate or estimate as accurately as possible the TOTAL time spent on closed clients (B and S) Productive time only #

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16 Determine your hourly billing rate. This is the total dollars generated by closed transaction (Line 2) divided by the total hours spent by you personally working with the client; not the prospecting or admin time (Line 15) \$/hr

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17 Calculate the costs of Your marketing hours by multiplying total Marketing hours × your personal hourly billing rate. (Line 14 X Line 15) \$

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## Quantum Masters Coaching™

### BUSINESS ANALYSIS

#### Production Plan for Next year

For: \_\_\_\_\_

Twelve Months Ending: \_\_\_\_\_

	Past Year	Plan Year
1. <b>Total Commissions</b> <i>(Multiply by 125% or enter desired value for Plan year)</i>	_____	_____
2. <b>Percent of Increase</b> <i>(Plan Year – This Year ÷ Last Year)</i>		_____
3. <b>Total Closed Units</b> <i>(Plan Year Line 1 ÷ Last Year Avg Commission)</i>	_____	_____
4. <b># of Listings Sold</b> <i>(Production Analysis Line 16 x Plan Year Line 3)</i>	_____	_____
5. <b># Listings Taken</b> <i>(Plan Year Line 4 ÷ Production Analysis Line 4)</i>	_____	_____
6. <b># Closed Buyer Controlled Sales</b> <i>(Plan Year Line 5 ÷ Production Analysis Line 17)</i>		_____
7. <b>Listing Taken need each month</b> <i>(Plan Year ÷ 12)</i>		_____
8. <b># Buyer Controlled Sales need each month</b> <i>(Plan Year Line 7 ÷ 12)</i>		_____



## Sample Foundation

**The Quantum Masters Coaching™ Program 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 session. Housekeeping for late participants will be done as a group process. The Coaching Meeting begins at exactly \_\_\_\_\_
3. No smoking in the training room.
4. That each participant commits to being open, willing to be confronted, and willing to actively participate in each session, and specifically to tell the truth and be honest. Additionally, each participant agrees to show respect and compassion for everyone in the group.
5. That the content of the meeting is a private and confidential matter between you and the group. All materials, forms, concepts and conversations shall be kept strictly confidential.
6. That each participant commits to reviewing their vision daily and will make daily commitments relevant to their vision, except when vacationing. Vacations are to be scheduled in advance and detailed in the first meeting.
7. That each participant commits to managing and integrating his/her life in the areas of business, personal, health and recreation. Each participant agrees to support each other in the face of negativity and resistance; and each participant agrees specifically not to compete with anyone in this group.
8. That no alcohol or drugs will be ingested 12 hours prior to each session.
9. That all portable pagers and phones brought into the room are to be turned off (not on vibrate.)
10. That each commits to developing a measurable goals and plan of action for the duration of the program.
11. That each participant commits to enrolling his/her personal and professional relationships in supporting him/her in this program.
12. That any changes require unanimous agreement from the group.
13. That the communication during the training is with the coach, or the group as facilitated by the coach.

**Signature**\_\_\_\_\_

**Date**\_\_\_\_\_



# Quantum Masters Coaching™

## Time Commitment

The times for the program will be determined in advanced. No changes can be made to the final commitments without unanimous agreement of the participants.

Please initial each time commitment:

Initials	Event	Day/Date		Time
_____	Meeting One	_____	at	_____
_____	S.E.L.L. Day 1	_____	at	_____
_____	S.E.L.L. Day 2	_____	at	_____
_____	Meeting Two	_____	at	_____
_____	S.E.L.L. Day 3	_____	at	_____
_____	Scientific Marketing	_____	at	_____
_____	Meeting Three	_____	at	_____
_____	Meeting Four	_____	at	_____
_____	Meeting Five	_____	at	_____
_____	Probe Day 1	_____	at	_____
_____	Probe Day 2	_____	at	_____
_____	Probe Day 3	_____	at	_____
_____	Meeting Six	_____	at	_____
_____	Meeting Seven	_____	at	_____

I understand that I have committed to attend Quantum Masters Coaching™ and Quantum Trainings on each of the above dates. If I miss any meeting or significant part of an event, I will need to drop out of this coaching session and attend a later one (at the discretion of the coach)

Signature:\_\_\_\_\_

Date:\_\_\_\_\_



# Commitment Worksheet

CONFIDENTIAL

The commitment format outlined is intended to enable you to realize maximum results.

All information will be held in confidence.

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Coach: \_\_\_\_\_

Session No: \_\_\_\_\_

## COMMITMENTS

Completed	Not Completed
<input type="checkbox"/>	<input type="checkbox"/>

Business:

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<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Personal

---

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---

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<input type="checkbox"/>	<input type="checkbox"/>
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Health/Recreation:

---

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---

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<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Relationships/Family:

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Agent: \_\_\_\_\_

Branch: \_\_\_\_\_

Activities → Contacts → Appointments → Results → Mastery

[illegible]



Making Commitments that are S.M.A.A.R.T.

**S:** Specific

**M:** Measurable

**A:** Actions

**A:** Ambitious

**R:** Reasonable (Reachable)

**T:** Timed



# VISION MANAGER SUPPORT

## PROBLEM DISSOCIATION

### EXAMPLE:

#### **Partner does not achieve committed outcome:**

Before attempting to “handle” the problem be sure that you are clear as to the intended support involved...no judging and no criticizing or fixing.

Use the following language to “Empower the Solution”:

1. What do YOU have to do...?
2. What will YOU need to do...?
3. What will YOU need to know...?
4. What would YOU suggest...?
5. What do YOU think might (work, solve, cause)... to happen?
6. What has to happen in order for... to happen?
7. What can YOU do in order for ... to be (resolved, solved, concluded, put together, handled)?
8. Given that we are (not going to, not ready to etc.) (what could YOU do, how are YOU, how could YOU)...?

### EXAMPLE:

#### **Partner does not call as agreed or does not support you:**

#### **Language:**

1. What you are doing is not working for me.
  2. I understand how you feel.
  3. What has to happen for you to \_\_\_\_\_ with me?
  4. What can I as your vision partner do to support you? What will you need to do in order for it to work for you?
- Identify the issue. Create alignment, not control.  
Use foundation as last resort. Use *FEEL, FELT, FOUND*.

#### **Language:**

What is it that is not working for you?  
Are you willing to have it work?  
What will you need to do in order to have it work for you?  
What can I (we) do to support you?  
What has to happen for us to be supporting of you?  
What has to happen for you to be willing to be supported by me?



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licensee By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Its: \_\_\_\_\_  
Date: \_\_\_\_\_