



JTM FORMS AND SCRIPTS

A Fresh, Effective Approach to Recruiting and Training New Agents



VENTURA
BARNETT
PROPERTIES

The Journey To Mastery™



The Journey to Mastery™ Forms

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You acknowledge that you have read this agreement, understand it and that it is the complete and exclusive statement of your agreement with Douglas M. Yeaman and Quantum which supersedes any prior agreement, oral or written, and any other communications between Douglas M. Yeaman, Quantum its representatives and you relating to the subject matter of this agreement, and that your obligations under this agreement shall inure to the benefit of Douglas M. Yeaman, Quantum's as licensor whose rights are being licensed under this agreement. No variation of the terms of this agreement will be enforceable against Quantum unless Quantum gives its express consent in writing signed by Douglas M. Yeaman. In the event of enforcement licensee agrees to pay all attorney's fees and court costs.

License Granted By

Date

Printed Name

Signed

Date

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License Granted By _____ Date _____

Printed Name

Signed

Date

JTM Group Zero Responsibilities

Your designation in Group Zero is designed to help you identify your starting position in a total of 6 groups. You can recognize your progress to graduation and production, by the group you qualify to participate in. Each group is based on a growth curve and a measured level of activity, which will predict both your current probability of success and indicate your next set of relevant steps in the training process.

Your job is to get out of the group you are in; not because it is a "bad" group, but rather because it describes your growth and is part of the growth process; in other words, no change, no growth.

Each of the following items is a condition for your participation and indicates you understand what is necessary to complete Group Zero so that you will be able to begin your participation in real estate activities.

You agree that:

- ☐ I will be on time at the Quantum Home Tour™ location for my assignments.
- ☐ I will be on time for appointments I make with the Quantum Home Tour™ Leader.
- ☐ I will be Presentable and Professional in appearance and actions at all company events, including Action Monday™; also I
 - WILL NOT smoke before or during Quantum Home Tour's™
 - WILL NOT wear perfume or cologne at Quantum Home Tour's™
 - WILL wear attire appropriate to impart a professional image
 - I WILL be open to feedback about my image in the interest of making money and fitting into the company.
- ☐ As a Group Zero Trainee, I will not greet or associate with visitors. I am in an observer status while in Group Zero.
- ☐ I will save my questions for the Quantum Home Tour™ team while the team is working. My questions will be addressed at the end of the day. Their priority is to greet and work with customers who visit the Quantum Home Tour™. My training will be done in a structure just like the one I am observing to ensure that I am getting the same hands on support and training.
- ☐ I will observe and be as unobtrusive as possible and let the Quantum Home Tour™ team do their job.
- ☐ I will be available and willing to assist agents with anything required of me.
- ☐ I understand there are no unexcused absences for Action Monday™ or Call Night. I am eligible for 4 absences before termination and may use them in any way I choose. On the fourth absence, I am automatically agreeing to separate from the company without further discussion or protest.
 - o A late equals half a miss.
 - o Showing up on time to the training is part of learning time management with my client and discipline for my own production.
- ☐ I will have my Action Monday™ paper work ready prior to the start of Action Monday™. I agree not to come into the room and complete incomplete paper work. I agree to complete all paperwork outside of the room and if I bring into the room, I understand that I will be ask to go out of the room and complete. I further understand that if paper work is not completed by 10:00am for Action Monday™ it is the same as being late.
 - o Paper work done is part of the training and discipline around completing paper work for my client.
- ☐ I will be sure to write my name on my materials (scripts books, personal items, etc.)
- ☐ I will meet with my loan officer on my first Action Monday™.
- ☐ I understand that there is a checklist associated with this foundation and I understand that it is my responsibility to see that each item is completed within 2 weeks of the start of my participation in Action Monday™. Any delay shall be my responsibility and I will initiate and call attention to any delay with my Action Monday™ manager.
- ☐ By signing this agreement, I am committing to the above standards and procedures as a participant in Group Zero..

Signature _____ Date _____

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Signature_____

Date_____



AGENT NAME: _____

WEEK BEGINS: _____

OFFICE: _____

SUMMARY OF LAST WEEK:

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

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

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

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

	Scheduled Open House Addresses	Date	Time
1			
2			
3			



Committed Buyer Checklist

For	Company	CLIENT SOURCE: Open House.....a Floorcall.....b Sphere of Influence....c Cold Call.....d Farm.....e Mailout.....f Community.....g
Client	Date acquired	
Date called	Appointment Date:	
Open house	Address	
Work phone ()	Home phone ()	

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

PHASE ONE - BUYER INTERVIEW

YES NO **WE HAVE AGREED:**

☐ ☐ 1. To have all decision makers present in person.

☐ ☐ 2. To spend at least 45 minutes in interview.

☐ ☐ 3. To come to an agreement on what you're looking for.

(1) _____

(2) _____

(3) _____

☐ ☐ 4. That I am your exclusive agent and I represent you.

☐ ☐ 5. (Buyers agreement attached)

☐ ☐ 6. That you will be **pre-approved** by _____ for \$_____

☐ ☐ 7. That you are prepared to buy now.

☐ ☐ 8. Date/time of next appointment. _____

☐ ☐ 9. That we will be in communication.

☐ ☐ 10. Buyer is prepared to make a decision on property and to make an offer.

PHASE TWO - SHOWING PROPERTY

Again, I don't work the way most agents do. I only want to show you properties that are meaningful and fit your needs.

☐ ☐ 1. Pre-write offer and have on clipboard before showing property.

☐ ☐ 2. Show 3 properties.

☐ ☐ 3. Bring back to office for debriefing.

☐ ☐ 4. Write offer.(Go to 3A)

☐ ☐ 5. Re-interview to redefine needs and identify where communication broke down.(Go to 3B)

PHASE 3A- SHOWING PROPERTY

☐ ☐ 1. Pre-write offer and have on clipboard.

☐ ☐ 2. Present offer.

☐ ☐ 3. Countered.

☐ ☐ 4. Accepted.

☐ ☐ 5. Set financing appointment and give completed file to escrow specialist.

PHASE 3B-SHOWING PROPERTY

☐ ☐ 1. Re-establish needs _____

☐ ☐ 2. Identify what got in the way _____

☐ ☐ 3. Show 3 properties.

(1) _____

(2) _____

(3) _____

☐ ☐ 4. Bring back to office for debriefing.

☐ ☐ 5. Write offer.
(Go to 4A)

☐ ☐ 6. Make appointment with manager (date/time) _____
(Go to 4B)

PHASE FOUR4A - MANAGEMENT SUPPORT

☐ ☐ 1. Pre-write offer and have on clipboard.

☐ ☐ 2. Present offer.

☐ ☐ 3. Countered.

☐ ☐ 4. Accepted.

☐ ☐ 5. Set financing appointment and give completed file to escrow specialist.

PHASE 4B-MANAGEMENT SUPPORT

☐ ☐ 1. Re-establish relationship with manager present.

☐ ☐ 2. Identify what got in the way with managers assistance.

☐ ☐ 3. Show 3 properties.

(1) _____

(2) _____

(3) _____

☐ ☐ 4. Bring back to office for debriefing.

☐ ☐ 5. Write offer.(Go to 5A)

☐ ☐ 6. Discontinue working with client.(Go to 5B)

PHASE 5A

☐ ☐ 1. Present offer.

☐ ☐ 2. Countered.

☐ ☐ 3. Accepted.

☐ ☐ 4. Set financing appointment and give completed file to escrow specialist.

PHASE 5B

☐ ☐ 1. Help client understand that he/she is not a buyer now. Establish when they are.

☐ ☐ 2. Put on follow-ups and mailing list.

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

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

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

Business Cards Provided

☐

Clients

Date

Agent

Broker



O.E.-Directives

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

MODIFIERS

What
When
Where
Why
How

TAG- (Crystallization)

What does ___ mean to you?

SUMMARY

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

CLOSED END

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

PROBING TIME

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

ISSUES:

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



AGENT NAME: _____

MENTOR : _____

DATE: _____

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

SECTION II TIME MANAGEMENT

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

SECTION III ACTIVITY

Number of Quantum Home Tours™ held: _____

Names & phone numbers collected: _____

Number of appointments from Quantum Home Tour™: _____

Number of Drop By appointments from Quantum Home Tour™: _____

Total Number of appointments: _____

Number of new clients/prospects this week (list) or (see new prospect roster): _____

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

Number of Listing Presentations Made: _____

Number of Certified Buyers™ total (list): _____

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

SECTION III RESULTS

Number of new escrows open this week: _____

Number of escrows open total: _____



The Journey To Mastery™

Quantum Home Tour™

Forms





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

[illegible]

Quantum Home Tour™ Guest Register



AGENT: _____
DATE: _____
ADDRESS: _____

NAME

ADDRESS

CITY

STATE

ZIP

PHONE #

EMAIL

OCCUPATION

Your first visit?

Yes ☐

No ☐

Do you:

Own ☐

Rent ☐

When do you need a home?

Now ☐

1-3 Months ☐

3-6 Months ☐

How did you hear of us?

Friend ☐

Driving by ☐

Newspaper ☐

Signs ☐

Radio ☐

Other ☐

NAME

ADDRESS

CITY

STATE

ZIP

PHONE #

EMAIL

OCCUPATION

Your first visit?

Yes ☐

No ☐

Do you:

Own ☐

Rent ☐

When do you need a home?

Now ☐

1-3 Months ☐

3-6 Months ☐

How did you hear of us?

Friend ☐

Driving by ☐

Newspaper ☐

Signs ☐

Radio ☐

Other ☐

NAME

ADDRESS

CITY

STATE

ZIP

PHONE #

EMAIL

OCCUPATION

Your first visit?

Yes ☐

No ☐

Do you:

Own ☐

Rent ☐

When do you need a home?

Now ☐

1-3 Months ☐

3-6 Months ☐

How did you hear of us?

Friend ☐

Driving by ☐

Newspaper ☐

Signs ☐

Radio ☐

Other ☐

NAME

ADDRESS

CITY

STATE

ZIP

PHONE #

EMAIL

OCCUPATION

Your first visit?

Yes ☐

No ☐

Do you:

Own ☐

Rent ☐

When do you need a home?

Now ☐

1-3 Months ☐

3-6 Months ☐

How did you hear of us?

Friend ☐

Driving by ☐

Newspaper ☐

Signs ☐

Radio ☐

Other ☐

NAME

ADDRESS

CITY

STATE

ZIP

PHONE #

EMAIL

OCCUPATION

Your first visit?

Yes ☐

No ☐

Do you:

Own ☐

Rent ☐

When do you need a home?

Now ☐

1-3 Months ☐

3-6 Months ☐

How did you hear of us?

Friend ☐

Driving by ☐

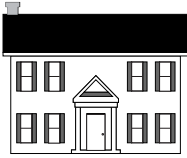
Newspaper ☐

Signs ☐

Radio ☐

Other ☐





Name _____

Phone () _____

I	Individual Demographic	Yes	No
---	------------------------	-----	----

- | | | | |
|----|--|---|--------------------------|
| 1. | Are you familiar with the area? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | Do you own a home now? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | How long have you been looking? | <input type="checkbox"/> 30 <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+ | |
| 4. | Have you been looking in this area? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. | Have you seen a lot of properties? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | Have you ever purchased property before? | <input type="checkbox"/> | <input type="checkbox"/> |

Special Property Questions:

	Yes	No
--	-----	----

- | | | | |
|----|--|---|--------------------------|
| 1. | Do you work in the area? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | What kind of work do you do? | Type: _____ | |
| 3. | How many people in your family? | <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5+ | |
| 4. | What do you like about homes you have seen | _____ | |
| 5. | In what price range are you looking? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | Have you been pre-qualified by a lender? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | How soon are you moving? | <input type="checkbox"/> 30 <input type="checkbox"/> 60 <input type="checkbox"/> 90 <input type="checkbox"/> 120+ | |

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

Our appointment is scheduled for _____ at _____.

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

Confirmation required

Reestablish relationship.

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



The Journey To Mastery™

Scripts



Quantum Home Tour™ Procedure

Example

Role Play

Invitation Script

Knock, knock/Phone script.

Hello, my name is _____ and I work with
_____. I don't want to bother you right now if
you're busy, but when would you have a few minutes to talk?

(Get "Yes" - Establish permission)

Our company is holding an Quantum Home Tour™ in your
neighborhood and we have been getting a lot of interest in it.
We want to invite you and your family to come and see the
home and tell your friends about it.

Are you free today between noon and six?

Good! How would you feel about stopping by and helping
your neighbors sell their home? When you see the house it
may remind you of someone you know who would like to live
in your neighborhood. The sellers would appreciate any
friendly referrals you could offer that would help them. Can
you drop by?

Where is it located?

(Give address)

Will you be there today?

(Get yes)

Fine, I'll definitely be there and I look forward to seeing you.
Thank you. What is your name? Excellent - we'll see you
later

Oh, by the way, feel free to bring any friends.

Sign-in Script: Quantum Home Tour™

Introduction

*Make sure prospect
makes connection
and relates to you.*

At the seller's Request, and as a condition for seeing the property...all guests are ask to sign the Guest Register and complete the information sheet before viewing their home.

Sign-In

*Make sure you have
information before you go
on.*

(Touch the sign in sheet twice and check to make sure it is accurate.)

Pre-Survey Script Quantum Home Tour™

Pre-Survey Script: Quantum Home Tour™

Introduction

*Make sure prospect
makes connection
and relates to you.*

(Name), We are conducting a survey on behalf of the seller that will assist our seller in understanding how their property is positioned in the market place.

Permission

*Make sure you have
permission before you go
on.*

I have a few questions I'd like to ask you, and I can ask them now, would that be OK?



Home Tour™ Follow-Up Script

Introduction

*Make sure prospect
makes connection
and recognizes you.*

Hello (name), this is (your name) with (company).

We met earlier today at the Quantum Home Tour™ on
(address).

Permission

*Use experience of
meeting to spring board
conversation.*

Are you free to talk on the phone for a couple of minutes?

If yes, continue.

If no, ask when you can call back.

Okay, good. I didn't get a chance to spend much time with
you today at the Quantum Home Tour™ and I wanted to
follow up and touch base with you.

(Answer questions)

Draw Out

Tell me a little bit about your situation.

How long have you been looking?

What time frame are you looking at?

What area do you want?

Body

You know, we have hundreds of homes on the market right
now and here's what I've found that works. I don't work with
every potential client. I spend time with you to determine
exactly what your needs are and then I go to work to find the
property. You probably won't see a lot of property with me
but the properties I show you will be meaningful.

Home Tour™ Follow-Up Script

Ask For Appointment

*Make sure all decision
makers are present.*

When would be a good time?

How about...?

Which time...?

What time...?

Tell me who are the people involved in the decision making process?

Will you be sure to have them with you at our meeting? I will take personal responsibility to ensure the hour we spend together will be of value.

Clarify Once Again

Time, date, place, and travel information.

Confirm names of all people expected.



Jelly Bean Jar Permission Script

My business is referral dependent. I am putting together a small group of people who I will stay in touch with on a regular basis concerning my real estate business.

I'd like to include you in this group and what that would mean is that I'd be touching base with you once a month for a two minute phone call to ask if you know of anybody I should contact who has any needs regarding real estate. Would that be okay? I really appreciate that!

Also, in the event that you have any needs or anything that I can get from this group on your behalf, I'd be happy to pursue that as well.

Jelly Bean Jar Protocol

1. Fixed in size
2. Personal contact every 30 days
3. Look for red ones
4. Add one - you must drop one

First Jelly Bean Jar Call - People You Know

Introduction

*High toned, Enthusiastic to
talk to them, Get
permission to talk first!*

*Go slow, make sure they
understand what it is you
are saying, pronounce
every word carefully.*

Hi (_____name), this is (_____your
name, with Ventura Barnett Properties, how are you?

Do you have a couple of minutes right now to talk?

Great, thanks....(_____name), as you probably know
already, my business is "REFERRAL DEPENDANT". I have
been looking at my business plan for the year 2000 and
where I want to go with it, and I have decided to put together
a small group of people. People that I have relationships with
like you that I would stay in touch with on a regular basis as
part of building my future business. And my purpose in
calling is touch base with you and see if it would be all right
to add you to this group. (Pause.....) What this would look
like is that I would call you once a month just to say "Hi" and
see if you knew of anybody I should be in touch with that has
any needs in real estate...it would only be a couple of
minutes each month as a phone call...? (Wait for response)

In The Group

*Let them know you really
appreciate them and their
willingness to participate.
Now give back something
if you can!*

(_____name), GREAT, I really appreciate this...I
promise I won't bother you with this and if you need anything
from me, that would help you when I am contacting this
group, I would love to do that. I want this to be reciprocal.
For example, I have someone that can _____
or I have included someone that
will _____.

Mailing

*Let them know you will be
mailing and offer again to
help them.*

Also, I will be sending something out in the mail each month,
keep and eye out for it, I would like your feedback very
much. And please let me help you with anything you need
that could come from the benefit of this group.



Inbound Ad/Sign Call Phone Script

Introduction

Highlight information of property BRIEFLY to move caller off of property and to prime them for relationship.

Keep control of conversation - keep brief - move conversation off of property into experience.

Hello, Ventura Barnett Properties, how may I help you?

I'm calling about the house I saw advertised in (newspaper).

Just a minute, let me get that ad in front of me so that I can be certain I give you accurate information.

What's your name?

Okay, (name). I've got that ad in front of me, what do you need to know?

(Give concise information about the property that is available, i.e. whether or not it has been sold, reduced, etc. Keep information to 2-3 key points.)

Draw Out

Get caller talking about their experience of looking for property.

Get caller to ENGAGE with you in relationship.

What was there about this ad that caught your eye?

How long have you been looking for a home?

What kinds of things are you looking for?

Oh yes, which, go on, of for heavens sake, really, wow (give lots of positive reinforcers).

Conversion

You must be convinced that this is the best way to work and hold the line, without compromise.

You know, (name), it sounds to me like you need someone to represent you. We have hundreds of homes listed and most of the property sells in days, before we can advertise it. So a lot of the time, what you see being advertised is property that is hard to move.



"How We Work" Script

Understand the integrity of the situation. If Married, get spouse at appointment.

Here's how we work. We sit down with you for a fair amount of time and thoroughly discuss what your needs are. When we have a clear picture of what is important to you, we agree to represent you. We will then watch all the new listings and when one matches we will show it to you, so you have a chance to see it before it gets advertised publicly. There are hundreds of properties that never get advertised.

What you need is someone who is really familiar with what it is that you are looking for, who is in close touch with the activity of the market and can represent you.

Pre-Close

How would you feel about coming into the office and meeting us?

Close

What would be a good time?

Which would be better?

How about...?

What time...?

Clarify Once Again

Time, date, place, and travel directions to office.



After Probing and Setting Appointment Script

"I will line up properties for you to write offers on. Before we see the properties, I need for us to have an understanding. What is important to me is that you make a decision on each property we see. It doesn't matter what your decision is. It's just important to me that you make a decision so I can tell where I am with you and that I am hearing what it is you're saying with respect to finding your property. A 'No' is just as important as a 'Yes'."

"I don't want you to feel pressured or pushed into something. I just want you to make a decision."

"So (day) _____ when we are seeing your property, be sure to have your check-book with you so you can write the offer on the property you choose. Again, if you don't want the home, don't write the offer. If you do want the home, be prepared to write the check right then and there.

"I will go ahead and prepare much of the paperwork on the offer and have it ready before we leave my office on (day) _____."

