#### Keller Williams® Masters Team™ Welcomes You To:

# THE JOURNEY TO MASTERY

Quality is never an accident. It is always the result of intelligent effort.

There must be the will to produce a superior thing.

—John Ruskin





#### Quantum Management Systems Conditional License Agreement

By using the materials containing The Journey To Mastery $^{\text{TM}}$  Program training manuals and associated materials, you accept the terms of this agreement. If you do not agree to the terms of this agreement, please promptly return materials to the site manager.

#### Conditional License

Quantum gives you, the licensee, the right to use the trade name "Quantum Home Tour $^{TM}$ ," the prescribed procedures contained in the Quantum Home Tour manual along with the attached documentation subject to the following conditions and restrictions:

You, the licensee, are continuously affiliated with the holder of the "site license" (in this case Keller Williams® Realty, Chicago); You conduct all Quantum Home Tour™ in strict accordance with the procedures outlined in the Quantum Home Tour™ Manual. A minimum of two agents participate in the Quantum Home Tour™, each complying with the above standards. Exceptions to this must be in writing by either Quantum Management or David W. Bracy, Keller Williams® Realty.

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The positive thinker sees the invisible, feels the intangible and achieves the impossible.

— Helen Keller



#### **Vision Statement**

The Journey To Mastery<sup>TM</sup> Program is a high-performance environment dedicated to creating excellence and achievement. We are committed to developing growth, optimizing outcomes, encouraging potential and creating conditions where winning is not an event, but an experience for everyone.

In our vision we recognize our mission is to:

- I. Enable optimally those who are suited for this career.
- 2. Enable those who are not to discover it early, appreciate the opportunity, grow from the experience, and go on to their next challenge with dignity and respect for the process. The success of this mission lies in our ability to create a condition in which the truth is told, and to respect each other in doing so.

We are what we repeatedly do, and for us excellence is not an act but a habit. We, the participants in the program, are ordinary people with extraordinary determination. Choice, not chance, determines our outcomes.

We appreciate that it takes courage to push ourselves to places that we have never been before...to test our limits...to break through our barriers.

We are inspired by the invisible, we feel the intangible and achieve the impossible.

Douglas M. Yeaman Journey To Mastery<sup>TM</sup> Vision Statement



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# What is Real Estate Really Like?

It's what you learn after you know it all that counts.

— John Wooden



#### The Plain Facts About a Career in Real Estate

#### Real Estate

The phrase conjures up soaring property values, solid investments and a shoo-in for those looking for that independent, big-bucks career.

That, however, is the myth. In fact, about half of the people in possession of a real estate license make under \$10,000 a year. The average income is less than \$8,000 per year. And if that isn't discouraging enough, 75% of new licensees drop out of real estate their first year in the business. Of the 25% that survive, 75% again flee the field in the second year.

With conventional methods of orientation and training, the new agent is unlikely to collect a commission within their first nine months. Very few individuals can afford to work without regular compensation. Therefore, in most companies, there is a high turnover. Of those agents that remain, most are not full-time representatives.

Morale becomes a problem because there is no positive feedback or reinforcement of the right kinds of activity. New agents become disenchanted with the real-estate marketing profession.

#### Avoiding the Pitfalls

Some companies are not very protective of their new agents. The new licensees are sometimes exploited by the seasoned agents. It is not uncommon for the new agents to do all of the "leg work" in exchange for a small wage, but the rewards and profit are reaped exclusively by the seasoned agent. The new agent never develops his or her own leads or clientele. Even assuming that the typical real estate office does not permit the exploitation of new agents, there is still the difficult learning curve that must be overcome. One method of dealing with this slow and difficult learning curve is to work at more than one job, making real estate marketing more of a "hobby" than a profession. This is typical for the industry, but there is another way—a better way—to do things.



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#### The Plain Facts About a Career in Real Estate

Early development is important to your future success. In 1985, Douglas M. Yeaman conducted a study. The study focused on identifying key factors for substantial success in the field of real estate marketing. It was determined that the habits developed in the first six months and the ability to produce quickly were more significant than any other single factor. The study also found that agents who did not open a transaction or write an offer until the second half of their first year were substantially disadvantaged. Less than 15% of the agents in this category ever made it past their first year. It takes approximately 60 days for a transaction to close. This means that if no transactions are opened during the first 90 days, the agent will not receive a paycheck for at least six months. This is typical for the industry.

#### Fortunately, Not All Real Estate Companies Are Alike

Keller Williams<sup>®</sup> Realty is able to truncate this "learning curve" by enabling Associates to become productive and profitable early on. The program combines intensive sales training and orientation with a unique mentoring program. The program is called The Journey To Mastery<sup>TM</sup> "Program" and it has a proven track record for success.

As a JTM $^{\text{TM}}$  participant, you will become integrated with Keller Williams $^{\otimes}$  Realty Marketing Team. The sales environment will be one of cooperation and mutual support rather than the competitive sales environment of the typical real estate office.

<u>Success takes dedication and commitment.</u> Agents, as well as their spouses and partners, need to be prepared for the rigors of the job. During the most critical period in your career, <u>you must work 2-3 weekends a month</u> and you will be working between 40 and 48 hours per week. This level of commitment is absolutely necessary for success in the real estate market.

Douglas M. Yeaman, creator of The Journey To Mastery<sup>TM</sup> Program, comments, "I do not make up the rules, I merely describe the reality of the market. Real estate is a weekend game. There is only one formula for success, and it is part inspiration and part perspiration."



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#### Choosing The Right Course

Starting a new career is probably one of the most important decisions that a person can make. Therefore, a great deal of thought should go into your decision to become part of  $JTM^{TM}$  's Real Estate Team.

Self Evaluation:
Is a Career in Real Estate Right For You?

Do you work well with people?

Interpersonal skills are necessary in any career. This is especially true in the field of real estate. As a real estate associate, your ability to relate well with people and to form professional relationships with prospective clients is one of the most important attributes you can possess. You will learn various techniques for qualifying buyers and conducting market analysis. You will also work harder than you ever imagined. The bottom line is that real estate marketing is about people helping people.

Are you willing to take charge of your career?

"Taking charge" means being in control. It is an attitude that generates opportunities for success. It requires motivation, determination and self-discipline. You must be willing to take action. In this field, nothing will happen automatically. It requires purposefully directed action—a conscious decision, and then, an affirmative action, to make it work. Sales techniques, knowledge of property law and financing are not enough to ensure success.

Are you willing to make a commitment?

Once you have made the decision, you must do everything in your power to make it happen. You must give yourself every opportunity for success. This requires getting the best training available. Keller Williams® Realty is the right place to start. Here, you will receive the most effective real estate marketing training course available: The Journey To Mastery<sup>TM</sup> Program.





## Career Commitment

Find out who and what you are, and then try to be that, perfectly.

— Douglas M. Yeaman



#### Career Commitment

#### Initial Interviews

Your introduction to the program is usually in a group. You may include your spouse or significant other in the interview process. You are going to need his or her support to make the transition to Real Estate as your new career. We tell you about us and you tell us about you. This is the time to ask the questions you or your spouse need answered in order to confirm your commitment to a career in real estate with Keller Williams<sup>®</sup> Realty.

Some real estate companies hire only experienced salespeople. Some hire "anybody" and take a "wait-and-see" approach. With the Masters Team<sup>TM</sup>, we hire only those who want a full-time career in real estate. We expect you to have real estate marketing as your primary source of income.

#### Mutuality of Obligation

We are committed to supporting and training new agents! We will pay for the cost of your real estate training, but only if you work with us.

Parts of your training at Keller Williams® Realty are licensed by Quantum Management Systems. As their contract with us specifies, the training concepts may not be used should you leave us and join our competition.

Keller Williams® Realty is willing to invest in your future to help you realize your potential. After you obtain your license, we will provide you with the most effective and innovative sales training available. You will enroll in The Journey To Mastery™ Program (at a cost to Keller Williams® Realty in excess of \$10,000), but only if you agree to work full time for Keller Williams® Realty for one year after the competition of the Journey To Mastery™ Program (see Promissory Note, page 45).







# The Journey To Mastery Program

Today's preparation determines tomorrow's achievement.



#### The Journey To Mastery™

#### The Road to Results

We help you build client relationships for results. Our new agents consistently outsell other new agents, and where it usually takes new agents six to nine months to begin producing, some of our agents begin opening transactions their first month or two on the job! Quantum Management Systems has enjoyed unparalleled success with the training of new agents in The Journey To Mastery<sup>TM</sup> Program.

"In less than 30 days I had real clients that turned into real buyers." - Mary Fran McMahon, New Agent October 1999.

#### Getting on Track with The Journey To Mastery<sup>TM</sup>

The Journey To Mastery™ Program has helped hundreds of sales professionals to become top producers. One of the first things you will discover is that real estate marketing is not just about making sales, it is about developing relationships.

As the statistics of the real estate industry demonstrate, the top producers make most of the money, while 80% of all sales professionals in the industry make less than \$35,000 per year. If you're in the underpaid majority, we believe there are better ways to spend your time, and in one year we can prove it to you. Success may be closer than you think. Why not spend a year mastering your career?

#### What is Quantum?

Quantum Management Systems is a full-service management consulting firm. We have a proven track record in boosting executive effectiveness, employee performance and corporate profits. Through The Journey To Mastery $^{\text{TM}}$  Program, Quantum trains sales associates and professionals to manage time effectively, generate new clients and make the money they want within the targeted time period.

Douglas M. Yeaman, founder of Quantum Management Systems, is a nationally renowned management consultant and an inspirational leader. Having worked with more than 140,000 professionals, he is known for his remarkable ability to motivate and train people within an organization, enabling them to achieve peak performance.



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#### The Journey To Mastery™

#### Here's the Secret

In the face of the gloomy statistics surrounding the real estate industry today, a Park City, Utah based management consulting firm has had a remarkable impact on the success of many real estate organizations. Under its founder and president, Doug Yeaman, Quantum Management Systems offers a unique training program for new agents in real estate. The training is called The Journey To Mastery<sup>TM</sup> Program. And in a survey of beginning real-estate agents, its graduates outsold other beginning agents four to one.

What is Quantum's secret? A lot of it, according to Yeaman, lies in revealing a little-known truth about the industry. "Most people in real estate think they're selling houses. That's not what they do."

If this sounds unusual, Yeaman explains it in a way that makes sense: "Successful agents are actually engaged in supporting people in making their own decisions around their real estate needs. A successful career in sales is not really about selling. It's about establishing relationships that are mutually beneficial." As Quantum sees it, sales are a by-product of these relationships.

When a person makes a career choice to become an independent real estate agent, a painful fact has to be faced. New business is slow business. Over half of new agents fail within the first two years, and nearly all suffer a long period of no-growth before they start becoming profitable.

Typically brokers expect their new agents to take nine to twelve months to close their first escrow. Shortening the time for a new agent to become productive is one of the ways Journey To Mastery<sup>TM</sup> helps beginning agents.

Another way is by providing them business consulting services for the entire start-up period of their careers. "Most sales trainings," states Janice Rannick, a trainer with Quantum, "lasts for a week or two and are crammed with facts and techniques. We keep only one fact in mind. That is that the top 20% of sales professionals do 80% of the business. We teach our people everything they need to know to function like the 20% who are making the money."



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#### The Journey To Mastery™

An established business has a lot of operational support. This includes all its administrative systems, advertising, legal and financial help—as well as an established client base.

#### Smooth Selling

The Journey To Mastery<sup>TM</sup> Program focuses sales professionals in two main areas that maximize professional relationships. These are: setting standards for what is productive, and managing time. In Journey To Mastery<sup>TM</sup>, sales professionals learn exactly what to do to establish a productive client relationship.

Encountering clients from the standpoint of what's productive means letting go of prospective buyers who don't meet the standards. As Yeaman explains, "There are three standards that give agents results: (1) they are getting an agreement to an <u>exclusive</u> agency relationship; (2) assuring that the client is <u>able</u> to buy; and (3) assuring the client is <u>ready</u> to buy. Without these standards, time spent with a client is not income-generating."

Quantum has a similar philosophy in terms of time management. It teaches agents to analyze their work time in terms of what is productive, what is nonproductive, and what is indirectly productive. A specific ratio of time spent in these areas lets agents produce their desired results.

According to Sharon Swanton, "The Journey To Mastery<sup>TM</sup> Program supplies the resources it takes a successful producer three-to-seven years to acquire on his or her own. And they're available at the most critical part of the business cycle...at the beginning."







### 6 Month Timeline

Things may come to those who wait, but only the things left by those who hustle.

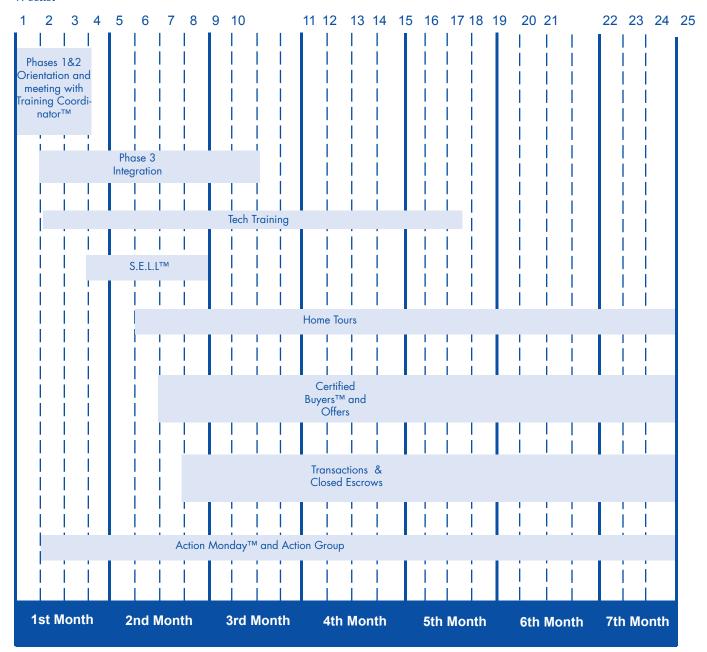
— Abraham Lincoln



#### New Agent Startup Timeline

It takes approximately four to nine months of directed activities for a new agent to become a producing member of the  $JTM^{TM}$  Team.

#### Weeks:





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#### Key to Agent Startup Timeline

Phase One: Phase Two: Phase Three: Initial Orientation and Introduction

Meeting between Agent and Director of New Agent Development Integration of Associates with the Journey To Mastery<sup>TM</sup> Team

S.E.L.L.<sup>TM</sup> Training:

Sales Environment Learning Laboratory<sup>TM</sup> (S.E.L.L.<sup>TM</sup>) is an intensive training program that all new Associates are required to attend. It contains three separate segments: Basic S.E.L.L.<sup>TM</sup> Training, Prestige Home Tour<sup>TM</sup>/Quantum Home Tour<sup>TM</sup> Certification, and Probing<sup>TM</sup> Certification.

Begin Prestige/QuanThe Prestige Home Tour<sup>TM</sup>/Quantum Home Tour<sup>TM</sup> is the central marketing technique for obtaining buyer and listing leads and establishing clientele.

Associates, in preparing for the Quantum Home  $Tour^{TM}$ , are required to identify comparative active properties, tour all of the for-sale-by-owner (FSBO) properties and expireds, and prepare a report on the home's location relative to schools, shopping and amenities of the neighborhood.

- Area tour, preview properties and prepare buyer CMA
- Prepare sign maps.
- Obtain permission to place signs.
- Deliver flyers and invitations.
- Phone invitations to any friends, relatives, potential leads or prospects.

Certified Buy-

Working with potential buyers involves what is referred to as Buyer Certification $^{TM}$ . See sample of Buyer Checklist on page 59.

• Client time:  $Probing^{TM}$ , showing properties, writing offers and negotiating.

Transactions & Closed Escrows:

Working with committed "certified" buyers pays off. The Program helps to screen out those not genuinely interested in purchasing a home.

Action Monday™ & Action Groups:

Weekly meetings where commitments are made, logistics of home tours are planned, statistics are gathered, and progress is reported.



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### Weekly Schedule

The price of success is hard work, dedication to the job at hand, and the determination that whether we win or lose, we have applied the best of ourselves to the task at hand.

-Vince Lombardi

Name				Office			
Data	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date							
7:00							
8:00 9:00		_					
10:00		Broker		Office			
11:00	Action	<b>Tour</b> verify day for		<b>Tour</b> optional			
12:00	Monday	local market				Ouantui	m Home
1:00			Tech Training	Jelly Been	Day Off	To	
2:00			9	Jelly Bean Jar	-	Client	
3:00				Workshop		Client	_istings
4:00							
5:00							
6:00							
7:00							
8:00							
9:00				Step # 3			
ASSIG	NMENTS FO	R THE WEE	K:		DETAIL:	<u> </u>	<u> </u>
1				-			
2				-			
3				-			
4				-			





#### Weekly Training Schedule

#### Weekly Training Schedule Key

Phase One:

Phase Two: Phase Three: Initial Orientation and Introduction Meeting between Agent and Manager

Integration of Associates with Marketing Team

S-Time:

S-Time is that time spent studying the scripts. S-Time takes priority over "A" Time and "B" Time.

T-Time:

T-Time (not to be confused with "tee-time") is short for Training Time. T-Time includes both formal and informal training (see "Formal Orientation Class" and "Step Three: Integration").

B-Time:

Preparation for Quantum Home Tours<sup>TM</sup> is what is referred to as B-Time. The following activities are included in B-Time.

- Agents, in preparing for the Quantum Home Tour<sup>™</sup>, are to conduct CMAs, to tour all of the for-sale-by-owner (FSBO) properties and all of the expireds, and to prepare a report on the home's location relative to schools, shopping and amenities of the neighborhood.
- Doing sign mapping.
- Getting permission to place signs.
- Sending out flyers and invitations.
- Phone invitations to any friends relatives or potential leads or prospects.
- Client time: Probing $^{TM}$ , showing properties, writing offers or going on listing presentations with Mentor.

A-Time:

A-Time typically involves participation during the Quantum Home  $Tours^{TM}$  as an assistant or "third-person". The following list of activities are included in the A-Time category and is in the order of priority:

- Host or hostess or guest at someone's Quantum Home Tours™
- Training Quantum Home Tours<sup>TM</sup>
- Full participation on a team
- When there are three Certified Buyers<sup>™</sup>, showing property



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# New Agents Initial Orientation



#### New Agents Initial Orientation

#### "Get Acquainted" Meeting

The Human Resources Representative meets with you initially. Here, the following administrative matters are taken care of:

- A. Review Recruiting Packet
- B. Begin the administrative induction process
  - 1. Provide "vital statistics"
  - 2. Assignment to Journey To Mastery<sup>TM</sup> Manager
  - 3. Review of employment forms and documents
- C. Receive a copy of the telephone scripts. Make sure you memorize the entire script. Memorizing the scripts are prerequisite to certification in the areas of training. Anyone can do it. Here is how:
  - Begin by reading the scripts and carefully preparing "flashcards," that is, three-by-five cards listing key words in the script. These are used as "cues" to help recall the content of the scripts.
- D. Many of the documents contained in the Keller Williams® Realty hire packet, including the Board of Realtors paperwork, must be reviewed carefully and then signed. The following list includes many of the documents that must be read and signed as part of your "in processing."
  - I. Commitment Agreement for Journey To Mastery TM Program
  - 2. Employee Handbook
  - 3. Commissioned Employment Agreement and Schedule
  - 4. Fair Housing Act & Keller William® Fair Housing Policy
  - 5. Antitrust Compliance Policies of Keller Williams® Realty
  - 6. Errors and Omissions Coverage
  - 7. Board of Realtors Application



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#### New Agents Initial Orientation

#### Meet Your JTM<sup>TM</sup> Manager

While a participant in the program, you will be working closely and under the direct supervision of the  $JTM^{TM}$  manager.

#### Integration

The Planned Integration with The JTM<sup>TM</sup> Team is accomplished by attendance at regularly scheduled meetings and debriefings, including but not limited to the following: Action Mondays<sup>TM</sup>, Action Meetings, Open Houses, Open House Training, and Target Intensive Training. This continues until formal S.E.L.L.<sup>TM</sup> training program begins.

- A. Planned Visits to a Quantum Home Tour™. You will Assist in putting up signs, passing out flyers, etc. However, primary objective is to observe—you do not share the responsibility for running the Home Tour.
- B. Attendance at special training workshop on Quantum Home Tour™ which will be conducted each month. You will participate and observe.
- C. Schedule yourself to all training programs and create calendar for next 4 months.



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#### New Agents Initial Orientation

#### Training Assignment

- A. The procedure for your training assignment is as follows: Your attendance at all meetings and training is required.
  - 1. You will receive a current training schedule.
  - 2. Your name is added to the list of candidates for Quantum training.
  - 3. You must make a commitment to attend all sessions. There is no provision for missing any part of any Sales Environment Learning Laboratory<sup>TM</sup> (also known as S.E.L.L.<sup>TM</sup>), Basic, S.E.L.L.<sup>TM</sup> Training, Prestige Home Tour<sup>TM</sup>, Quantum Home Tour<sup>TM</sup>; and, Probing<sup>TM</sup> Certification.
- B. Sales Environment Learning Laboratory<sup>TM</sup> (S.E.L.L.<sup>TM</sup>)<sup>TM</sup>:

Sales Success Training is an intensive training program that all new associates are required to attend. It contains three separate segments: Basic S.E.L.L.<sup>TM</sup> Training; Prestige Home Tour<sup>TM</sup>/Quantum Home Tour<sup>TM</sup>; and, Probing<sup>TM</sup> Certification.

#### Memorization of Script

Memorizing the scripts are prerequisite to certification in the areas of training.







# Sales Environment Learning Laboratory S.E.L.I.™

A positive attitude removes the rust from the mind, lubricates our inward machinery, and enables us to do our work with fewer creaks and groans.

—Helen Keller



#### Sales Environment Learning Laboratory<sup>TM</sup> (S.E.L.L.<sup>TM</sup>)

Working harder at something that doesn't work, still doesn't work. That is why we emphasize the process through which behavior is modified so the techniques taught in the program will be correctly applied. Merely teaching the theory behind the techniques does not immediately result in productivity gains. However, good techniques, combined with the ability to apply them in the market place, does.

We have identified the key areas that substantially affect an agent's productivity. These include the following: organization and time management; effective telephone and prospecting techniques; and decision shaping in one-on-one situations with clients. The behavior modification process, which is integrated with the learning of techniques, is an essential element.

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

- Organization and Time Management (which give a way of measuring your progress)
- Effective Prospecting Techniques
- Converting Leads Into Sales
- Probing (one-on-one sessions with clients)
- Developing Exclusive Buyer Relationships
- Increasing closing ratios
- Decision Shaping (structuring problem-free transactions)



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The Sales Environment Learning Laboratory<sup>TM</sup> (S.E.L.L.<sup>TM</sup>) has been designed for real estate agents. S.E.L.L.<sup>TM</sup> training teaches these individuals specific techniques that, if correctly utilized, will have a direct impact on productivity. In addition, S.E.L.L.<sup>TM</sup> training creates an environment in which the participants utilize these techniques and can modify their behavior so that the benefit of these techniques is fully realized.

#### Organization and Time Management:

The participants are introduced to an organization and time management system that is designed to allow salespeople to measure very specifically how they spend their time in relation to productive activities and how they can therefore restructure their activities so as to be more productive. This study in time is conceptual, as in reviewing the difference between productive and indirectly productive time and the laws of work expansion and triviality; and it is also practical, in that a system with forms and procedures for its use is introduced to the participants.

The resulting benefits of an implemented organization and time management system are to increase productivity through a redirection of time spent to include more productive and indirectly productive activities and less with nonproductive activities. Just as important a benefit is the control of time, resulting in more high priority activities and tasks being completed and more confidence because the day's events run smoothly.

#### Telephone and Prospecting Techniques:

It is Quantum Management Systems' belief that an organization will benefit substantially through proper use of the telephone by the agents. Productivity is increased because less time is spent procuring appointments. More leads are converted into appointments, and if set up properly on the phone, will yield sales.

We work with the participants in the S.E.L.L.<sup>TM</sup> Program so that they are fully equipped in prospecting techniques; we also emphasize the continual use of these techniques by modifying their perspective towards this type of activity.



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#### Decision Shaping:

Through proper understanding and use of communication structures in a one-on-one situation with a client, agents can increase their closing ratios and also structure the transactions to be more problem-free.

We start in this area with a conceptual look at why people buy things, from a behavioral point of view, and then structure a presentation so that the agent is, above all, helping the client to crystallize his needs.

The sales people are brought to an understanding of what benefits are, and of how to convert features to benefits. The selling process matches benefits to needs, getting agreement on points through the presentation and "shaping" the client's decision, leading into an effective close.

The sales people become more directional in their approach with a client, having objectives in mind for every face-to-face meeting, and are genuinely helping the client to fill his own needs. This is a counselor approach to selling, which results in greater rapport with the client, more referrals, and a higher closing ratio.

The Program employs role-playing as a learning tool, using audiovisual equipment to facilitate change.

It also results in more solid business, because through these techniques associates are taught to weed out clients who do not represent "workable transactions" and spend extra time, by prospecting, to find clients who do represent good business. Once again, productivity is increased, which is the Quantum Management Systems objective.



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#### The Behavior Process:

Herein lies the process through which behavior is actually changed. In every module, the agents are asked to make a minimum of three commitments, such as using the organization and time management system diligently and in a very specified manner for the duration of the program, and making an ambitious number of phone calls (they set the number, as long as it is ambitious) using the new structure every working day between the beginning and the end of the program, and using the new structure in every face-to-face selling situation, for a few examples. By the fourth or fifth meeting it is evident which sales people keep commitments and to what degree. It is at this point we discuss what the differences are between a sales person who is in a failure pattern and one who is in a success pattern.

Simply put, an agent who keeps commitments is in a success mode and gets what s/he wants (goals), whereas the degree of failure (not reaching goals) is dependent upon the degree to which commitments are broken. The participants have been set up through this process to see themselves in relation to success/failure modes. Very clearly, they cannot avoid realizing what keeps them from reaching their goals, and through discussion, come to an understanding of exactly and specifically what they must do to establish a success mode.

#### Logistics:

The Program is structured over a four day period, and meetings are scheduled for eight hours each. This may seem like a rigorous schedule, but it is essential to the program training. From a behavioral point of view, a minimum of twenty-one days is required in order for a change to occur in behavioral and attitudinal patterns. The learn-by-doing methodology provides a vehicle for reinforcement, and therefore techniques must be practiced before moving on to the next phase in the training.



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#### Summary:

To tie it all together into a cohesive experience, participants will be asked to interactively demonstrate and describe the techniques they have learned.

Simulations are conducted to achieve a sense of realism. Successful real estate agents, working with Quantum principles, will act as facilitators. By sharing their experiences, participants will get firsthand exposure in how to deal successfully with the varied situations they are likely to come across in their daily quest for more sales and listings.

Using the principle of commitment, we lead the participants to an extensive time-management-system methodology. Its impact is to give the freedom to set and reach goals, measure progress, and allow agents to fully enjoy the work that they do.







### Standards

Every job is a self-portrait of the person who did it.



#### Journey To Mastery™ Standards

By agreeing to participate in the Journey To Mastery<sup>TM</sup> and its foundation statement, I understand that the following minimum standards of activity must be met during the 90 day period to assure my success and continued affiliation with Keller Williams<sup>®</sup> Realty:

- Any member who misses more than 4 meetings may no longer participate as a member in The Journey To Mastery<sup>TM</sup> Program or Keller Williams<sup>®</sup> Realty.
- Every 2 times that a member is late, it shall count as 1 missed meeting.
- Agents agree to hold Quantum Home Tours<sup>™</sup> 2 weekends per month until they have/maintain three Certified Buyers, or have completed The Journey To Mastery<sup>™</sup> Program.
- All participants in the program shall use a time management system for each work day including but not limited to the weekly schedule.
- All buyers are to be certified and sign an "Exclusive Right to Represent" agreement.
- Associates agree to the following 90 day bench marks:

1st 90 days (3 months)

3 Certified Buyers

1 Written Offer

1 Certified Listing Appointment

2nd 90 days (6 months)

1 Buyer Transaction

2 Written Offers

Another 2 Listing Appointments

3rd 90 days (9 months)

3 Buyer Transactions in Escrow Another 3 Listing Appointments



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#### Office Standards

Each office has specific standards for production which will be reviewed quarterly. Only agents producing this amount shall be retained by Keller Williams® Realty.

The specific standards for production for Keller Williams® Realty are as follows:

• Cap for your office

[Note: Managers select the applicable basis and standard for the office. Each branch manager reserves the right to quarterly reviews.]

Agents not meeting the minimum production standard of the company, but in whom the manager has a fundamental confidence, will be given the opportunity to achieve that amount through participation in a support system called Action Groups. This support system is reserved for agents who have demonstrated a winning attitude, a willingness to produce, the character to achieve, and the integrity consistent with the Journey to Mastery<sup>TM</sup> program.

All inexperienced agents joining the company are expected to (1) maintain three certified buyers per month, (2) open one escrow per month, or (3) hold two Quantum Home Tours<sup>TM</sup> per month until they have met conditions (1) and (2) above.

Associate's signature)	(Date)



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#### Willingness List

As part of my participation with Keller Williams® Realty in The Journey To Mastery™ Training, I agree that I am willing to:

- I. Be personally responsible for my promissory note which I understand will be forgiven upon producing three closed buyer sales and three sold listings or in the event I am terminated from the program or the company. Additionally, I understand that I will be evaluated by Quantum Management Systems before I can be accepted in the training. I agree that in the event I leave Keller Williams® Realty prior to completion of Journey To Mastery™ and 12 months continuous affiliation and go to work in any real estate related field my full \$3000.00 note will be immediately due and collectable.
- 2. Be accountable and receive feedback on my actions.
- 3. Attend all sessions. This includes:

Action Mondays $^{\text{TM}}$  /Transaction Tuesday

S.E.L.L<sup>TM</sup> Training
Probing<sup>TM</sup> Certification

Prestige/Quantum Home Tours TM

Target Workshops (as Scheduled)

Technical Training

Jelly Bean Jar Workshop

M.L.S. Trainings

Office Sales Meetings (optional while in JTM<sup>TM</sup>)

Broker's Open House

- 4. Have Real Estate as my primary source of income—FULL TIME—upon being accepted into the Journey to Mastery Program.
- 5. Participate in prospecting activities that will yield MINIMUM production standards established by Keller Williams® Realty (up to 20 hours of prospecting activities and two home tours per month).
- 6. Be flexible around schedule, time and location changes due to the needs of the training. I will be given adequate notice and I am willing to manage my schedule accordingly. (S.E.L.L™ and Probing™ Certification Training dates and times will not change, locations may.)
- 7. Handle issues as they arise within 48 hours and be willing to talk to the person and not about the person at issue. This means issues with my partners I will handle with my partners, issues with my cluster I will handle with my cluster, issues with Quantum Management Systems I will handle with Quantum Management Systems, and issues with my Manager I will handle with my Manager.
- 8. Meet my office or branch minimum production standards.
- Work on issues of production and productivity. These include prospecting, organization and time management, committed clients (buyers only), and transaction management.
- 10. Participate fully at 100% in The Journey To Mastery™ Training knowing that it is NOT Real Estate training.
- II. Use a monthly calendar to define my activities and be held accountable to adhere to this schedule.
- 12. Be present at ALL Journey To Mastery<sup>TM</sup> training sessions.
- 13. Understand that there are costs inherent to doing business in the real estate industry and I am responsible for these costs and fees as well as any other real estate related expenses, except as specifically agreed to otherwise, in writing. (e.g. MLS fees, errors and omissions insurance, business cards, listing fees and listing related advertising, etc.).
- 14. Understand that I am being licensed to conduct Quantum Home Tours™ and that the system and information is proprietary and may be revoked by Quantum for failure to conduct properly or upon leaving Keller Williams® Realty.



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#### Promissory Note

The undersigned maker, for value received, hereby promises to pay to the order of Keller Williams® Realty the sum of three thousand five hundred dollars (\$3500.00).
Further, the undersigned maker, hereby promises to pay interest as specified below on the unpaid principal at a rate of 6% percent per annum. Interest will accrue at the above specified rate beginning on (termination date) and continuing until said principal and interest have been fully paid.
Payment in full of the above specified sum (plus any accrued interest) is due and owing on or before four months from date above. Failure to pay the amount due and owing on that date will constitute a default.
The maker will be liable and consents to renewals, replacements and extensions of time for payment hereof before, at or after maturity, and waives presentment, demand and protest and the right to assert any statute of limitations. A married person who signs this note agrees that recourse may be had against his/her separate property for any obligation contained herein. If any action is instituted or this Note, the undersigned promises to pay attorney's fees in the amount determined by court.
The Licensee understands that after continuous affiliation with Keller Williams® Realty as a licensed real estate agent for twelve consecutive months, after the successful completion of The Journey to Mastery Program, the note will be forgiven and the obligation will be discharged; Keller Williams® Realty will refrain thereafter from taking any action to enforce the Note, including but not limited to filing a notice of default, instituting suit or claim, or contacting credit reporting agencies.
In addition, this Note shall be forgiven and the obligation shall be discharged under the following circumstances:
I. Upon withdrawal from the real estate field and for a period of one year and upon execution of a Covenant Not to Compete for 12 months from date of withdrawal.
You have shown up and have participated as agreed but are being involuntary terminated for failure to meet Keller Williams® Masters Team™ minimum production standards.
I have read and understand the foregoing agreement.

Signature

Date

#### Journey To Mastery™

#### Foundation For Participation

The Journey To Mastery™ Program is designed to assist me in becoming productive (with 3 closed escrows) quickly. I understand my association with Keller Williams® Realty and my participation in the program requires my commitment to the following:

Signature Date	
14. I know I will be working up to 48 hours per week but I agree to take one day off during the	e week for rest or recreation.
13. I will be on time for all Quantum Home Tours <sup>TM</sup> , bring all equipment and materials necessary such equipment after the Quantum Home Tour <sup>TM</sup> . I am personally responsible for the signs	
sions, under all circumstances and until my first three (3) listings have closed.	
12. Until I have closed 3 buyer side transactions and graduate from The Journey To Mastery <sup>™</sup> have access to will be referred (turned over to) my Training Coordinator <sup>™</sup> , and I will receion any listing that sells. I am to include my training coordinator <sup>™</sup> in all listing client meeting.	ive my standard commission
before using them or taking floor time.	
11. I will obtain all necessary training and be responsible to know how to operate the phone syst	em and computer equipment
10. I will follow up on all buyer leads I obtain, ask for and get appointments, and get all the buy will reserve Tuesday evenings beginning at 5:00 PM to meet with other Associates in the calls to guests from the home tour registers and/or my buyers.	
9. I will attend every company meeting, and will go on caravan of the company's new listings	5.
8. I will obtain as many completed surveys as possible from guests at the Quantum Home To	our <sup>TM</sup> .
7. I will preview, prior to a Quantum Home Tour $^{ extstyle  exts$	orhood.
6. I will ask permission of neighbors, in writing, to place home tour directional signs on their the permission form.	property and have them sign
5. I will invite 25 people from my personal network to upcoming Quantum Home Tours $^{TM}$ .	
4. I will distribute a minimum of 100 flyers for each upcoming Quantum Home Tour™ unless manager and I will do this in a timely manner, meeting each person I hand out flyers to.	s stipulated in writing by my
<ol> <li>I will hold Quantum Home Tours™ 3 weekends per month on both Saturday and Sunday unt or until I have three certified buyers.</li> </ol>	til completion of the Program
2. Attendance on time for all meetings and appointments.	
<ol> <li>Attendance to each and every Action Monday™ and the associated Action Group Meeting.</li> </ol>	



#### Journey to Mastery™ Agreement

#### Reciprocal Duties

JTM<sup>™</sup> agrees to provide to you (the Agent) the following training:

S.E.L.L. $^{TM}$  training, which is a technical, results-oriented training program; Action Group $^{TM}$  Meetings; and Action Mondays $^{TM}$ .

Probing training focuses on communication skills that help determine the needs of buyers and sellers and creates relationships that are key to business success.

Prestige Home Tour<sup>TM</sup>/Quantum Home Tour<sup>TM</sup> is a proprietary licensed marketing event. Managed by a team of certified agents, this event creates attendance at the weekend Quantum Home Tour<sup>TM</sup> that far exceeds a typical open house. This marketing event typically results in the sale of a property within 2-3 weeks of the event, as well as providing additional business for the team members.

The Journey To Mastery™ Program, an innovative and intensive advanced individual training which includes a unique mentoring relationship with experienced, top-producing agents.

In exchange, you (the Agent) agree to the following terms and conditions:

You will remain active in the training until it is successfully completed, and you will commit the time and effort necessary to attend and participate fully in The Journey To Mastery™ Program.

You understand that you will graduate from  $JTM^{TM}$  upon the closing of your 3rd buyer sale and the closing of your 3rd Listing taken. The commission of these closings will be at a 50% of the gross commission income on the transaction.\*

You understand that you must co-list your 1st 3 listings with a listing mentor designated by the JTM<sup>TM</sup> Manager. This can take place during JTM<sup>TM</sup>. Your commission for these 1st 3 listings will be at 50% of gross commission income on your share. These listings will be under the name of the listing mentor and the split arrangement is as follows:

You will be paid at the commision level you are at when the listing sale closes.



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#### Journey to Mastery™ Agreement

It is understood that the company will capitalize the listing costs which will be deducted from your commission at close of escrow. The company will bear the cost of advertising and the Mentor will pay for the installation of a sign and will furnish the lock box.

You further understand that in the event that you are unable to complete the training because you voluntarily terminate your affiliation with Keller Williams® Realty, subject to the provisions set forth below, Keller Williams® Realty may immediately demand payment of the full amount of any promissory notes or other expenses incurred by you or on your behalf by Keller Williams® Realty . You do hereby authorize Keller Williams® Realty to withhold from any open escrow any amount owed by you at that time.

After continuous affiliation with Keller Williams® Realty as a licensed real estate agent for twelve consecutive months and the close of escrow of your first six real-estate transactions, the promissory note held by Keller Williams® Realty will be forgiven and your obligation to reimburse Keller Williams® Realty for costs of training will be discharged.

In addition, the obligation shall be discharged under the following circumstances:

Upon withdrawal from the real estate field for a period of one year and upon execution of a Covenant Not to Compete;

Upon involuntary termination of affiliation with Keller Williams® Realty for failure to meet Keller Williams® Masters Team™ minimum production standards.

I have read and understand the foregoing provisions and I willingly accept the terms of this agreement.

Signature:	Date:







# A Winning Image For Success

The greatest gift...is to see ourselves as others see us.

— Scottish Proverb



#### The Power of the Professional Image

Clothing is important, and it goes a long way toward making you feel really good about yourself. Dressing right for any occasion will not only influence how you are treated, but how you treat others. You owe it to your audience to dress your best.

#### How to Decode the Dress Code.

Consider the purchase of appropriate business clothing to be an investment. Buy the basics that wear well and mix well—classic styles are your best bet.

Clothing has always been an acknowledged communicator. The message matters. Your clothing could classify you before anyone gets to know you or your capabilities. How you dress affects your confidence and credibility.

Although the range of what is acceptable can be wide, the subliminal message your clothes communicate needs to be sober: "I'm serious, respected, and in control." This is not to say that you cannot be fashionable or even imaginative, as long as you project a professional image.

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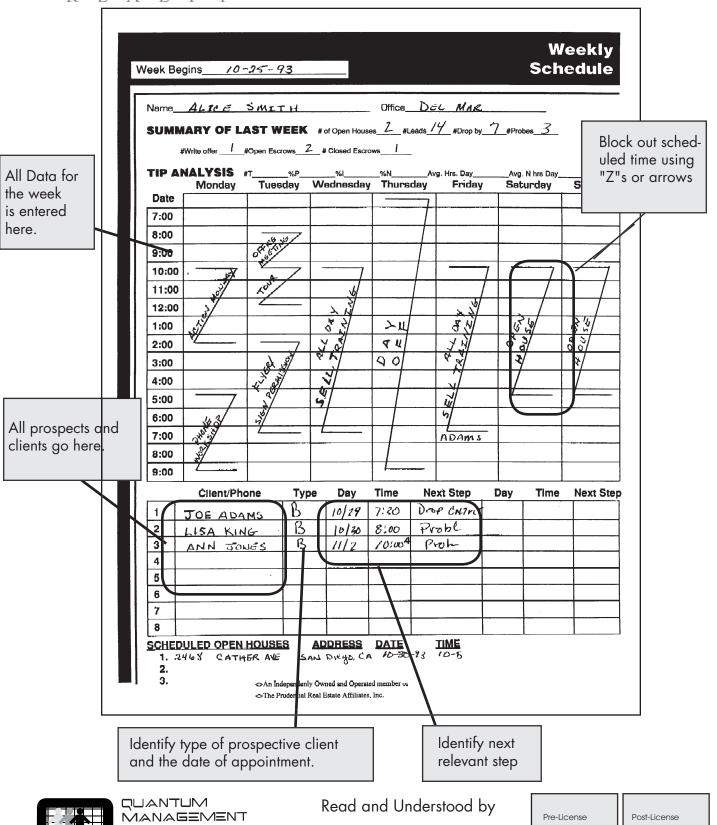
## Sample Forms

Don't measure yourself by what you have accomplished, but by what you could have accomplished with your ability.

—John Wooden



#### Sample Weekly Schedule





Personal information about perspective client is placed here.

#### Certified Buyer Checklist

		For Robert BigBucks Company Lasolf A  Client Rate Ph = Janice Biggpate acquired 10/10/93  Date celled 10/11/93 Appointment Date 10/14/93  Open house 1175 HARBOT LANE Address  Work phone (69) 259-1774 Horrie phone (69) 555-473						
			with you how I work. I don't work with every potential clients I do engage with, MUST be committed to producing	000000000000000000000000000000000000000	manan	amm	SHOWING PROPERTY	
	results.	ot arc	olicing 1 do chigago war, week so committed to producing		0		. Re-establish needs	
	100000000000000000000000000000000000000					-	S. Show 3 properties.	
te all	PHAS	E ON	E - BUYER INTERVIEW				1)	Indicate wha
dicated	YES	NO V	WE HAVE AGREED:				2)	
			I. To have all decision makers present in person.				3) Bring back to office for debriefing.	source gener
klist.			2. To spend at least 45 minutes in interview.	_	_		. Write offer.	client interest
			3. To come to an agreement on what you're				(Go to 4A)	JTM™ .
$\overline{}$	1		looking for. Pylvacy			6	i. Make appointment with manager (c	
/	/		(2) Valve			-	(Gc	P
			(3) Prestige	PH	ASE	FOL	JR4A - MANAGEMENT SUPPORT	
$-1 \times I$	ta'	<b>4</b>	1. That I am your exclusive agent and I represent you.				. Pre-write offer and have on clipboar	d.
γ	1	□ 5	(D				Present offer.	
- I \	ā	<u> </u>	5. That you will be pre-qualified by YVN d	0			B. Countered. B. Accepted.	
- 1 '	/ ا	-	5. (buyers agreement attached)  5. That you will be pre-qualified by YVN d.  for \$ 150,000 down payment.				i. Accepted. i. Set financing appointment and give	completed
	\ 4	U 7	7. That you are prepared to buy now.	_	_	•	file to escrow specialist.	oon plotod
	1	U 8	3. Date/time of next appointment.					
	12	□ §	D. That we will be in communication.	DH	ASE.	410.	MANAGEMENT SUPPORT	
			Buyer is prepared to make a decision on	**************	FRASE AD-MANAGEMEN I SUFFUR			
			property and to make an offer.			1	. Re-establish relationship with mana	ger present.
	PANG	e TW	O - SHOWING PROPERTY			2	. Identify what got in the way with ma	nagers
			<u> </u>	-		_	assistance.	
	Again,	l don	't work the way most agents do. I only want to				I. Show 3 properties.	
	show y	ou pr	roperties that are meaningful and fit your needs.				2)	
							3)	
		יש	Pre-write offer and have on clipboard before showing property.				Bring back to office for debriefing,	
	۵	0 2	2. Show 3 properties.	٥			. Write offer.(Go to 5A)	to ED)
			3. Bring back to office for debriefing.	u	U	б	i. Discontinue working with client.(Go	(0 30)
			4. Write offer.(Go to 3A)					
		0 5	5. Re-interview to redefine needs and identify		۵	1	. Present offer.	
			where communication broke down.(Go to 3B)				Countered,	
	PHAS	EJA	EHOWING PROPERTY				3. Accepted.	
		<u> </u>	Pre-write offer and have on clipboard.			4	<ol> <li>Set financing appointment and give file to escrow specialist.</li> </ol>	completed
			2. Present offer.				no to coolon appoiation.	
			3. Countered.				and the state of t	
			Accepted.     Set financing appointment and give completed.	u	u	1	. Help client understand that he/she l	s not a buyer
	J	_ ;	file to escrow specialist.			_	now. Establish when they are. 2. Put on follow-ups and mailing list.	
						. 2	A MUT ON TOLLOW-LINE AND MAILING LIST	

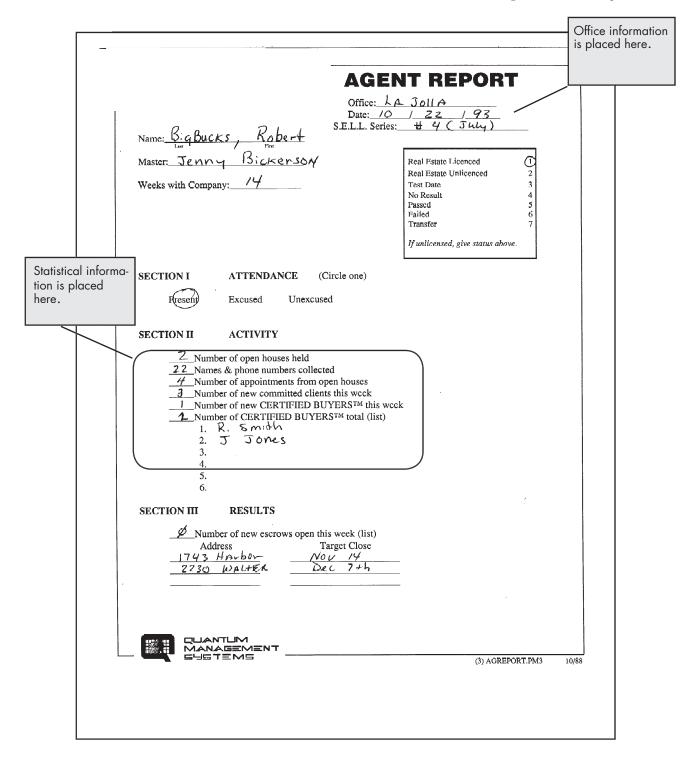


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#### Agent Report





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