



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

Week of: \_\_\_\_\_

Number of dials: \_\_\_\_\_ / = No Contact    ( / ) = Contact    ( X ) = Appointment Set

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	25		
																										50	
																											75
																											100
																											125
																											150
																											175
																											200
																											225
																											250
																											275
																											300
																											325
																											350
																											375
																											400
																											425
																											450
																											475

Appointments Sat: \_\_\_\_\_  
 Appointments Sold: \_\_\_\_\_  
 Close Ratio %: \_\_\_\_\_

Number of Appointments Scheduled: \_\_\_\_\_  
 Life AP: \_\_\_\_\_ Annuity AP: \_\_\_\_\_  
 Commissions (Paid): \_\_\_\_\_

Number of New Leads Purchased: FB FEX: \_\_\_\_\_ FB MP: \_\_\_\_\_ FB RCT: \_\_\_\_\_ EVQ: \_\_\_\_\_ BPL FEX: \_\_\_\_\_  
 BPL MP: \_\_\_\_\_ BPL T65: \_\_\_\_\_ CRM SCL: \_\_\_\_\_ Other (list source/type): \_\_\_\_\_

Lead Budget/Investment: \$ \_\_\_\_\_

Goal reached from prior week (circle one): YES / NO Goal for next week Appointments: \_\_\_\_\_ AP: \_\_\_\_\_

Interviews: \_\_\_\_\_  
 Pre-Licensing: \_\_\_\_\_  
 Contracts: \_\_\_\_\_  
 Hours worked (week): \_\_\_\_\_

	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
9-12							
12-3							
3-6							
6-9							

\* X = Dialing / = Running Appointments \*

	Day 1	Day 2
8		
9		
10		
11		
12		
1		
2		
3		
4		
5		
6		
7		
8		

15 14 13 12 11 10 9 8 7 6 5 4 3 2 1