

Name: _____

Week of: _____

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	Agency Meeting	Start: _____	Start: _____	Start: _____	Start: _____
		C: _____ A: _____	C: _____ A: _____	C: _____ A: _____	C: _____ A: _____
PM	Call Clinic End of Day Training	# of Follow-Ups: _____	# of Follow-Ups: _____	# of Follow-Ups: _____	# of Follow-Ups: _____
	_____ Confirmed PACs	C: _____ A: _____	C: _____ A: _____	C: _____ A: _____	C: _____ A: _____

Goals

Walk In: _____
 Closed Case: _____
 AP: _____
 PRs: _____
 Referrals: _____

Results

Walk In Total: _____ AP: _____
 # DMs Seen: _____ PRs: _____
 # Appointments: _____ % DMs to Walk Ins: _____
 # Presentations: _____ % Appt/Presentations to DM's Seen: _____
 # Closed Cases: _____ Closing %: _____

Fill In Above With:

- Enrollments – day, time, city, label
- Appointments – day, time, city, label
- # of Follow Ups
- # of Walk Ins – day, city
- Start & End times for each day
- AD/SA – Agent(s) in field training
- Personal Recruits: 7 recruits scheduled = 1 hire

Week:			
	AP Goal:	Emp. Eligible:	# Emp. Sold:
Week:			
	AP Goal:	Emp. Eligible:	# Emp. Sold:
Week:			
	AP Goal:	Emp. Eligible:	# Emp. Sold:
Week:			
	AP Goal:	Emp. Eligible:	# Emp. Sold:

Fill In

1. Enrollments/Re-enrollments

- Name of Business
- # Employees
- Employee Engagement Process
- City
- Projected AP

2. # Appointments, City

3. Prospecting Cities – Write in the projected cities to be prospected based on current areas that are being worked so that each are is being worked completely before moving on to the following city

Depending on the amount of projected AP based on the enrollments/re-enrollments – adjust the current week as needed with the following:

- 1. Hot follow-ups** – Prioritize the top 10 hot follow-ups that can be worked during the current week to ensure agents have an action plan for future weeks
- 2. Schedule in follow-ups** on previously completed presentations that haven't been closed
- 3. # of PACs** – Increase the current weeks number of PACs to ensure the agent has enough activity to see results