| Activity/Results | Daily | Weekly | Monthly | Quarterly | Annually | Actual Week 1 | Actual Week 2 |
|---|---|---|---|---|---|---|---|
| **Current/CLIENTS** | | | | | | | |
| Appointments | | | | | | | |
| Additional Business Generated | | | | | | | |
| Referrals Generated | | | | | | | |
| LinkedIn Recommendations | | | | | | | |
| Testimonials | | | | | | | |
| Referrals given | | | | | | | |
| Connect via LinkedIn | | | | | | | |
| Uncover associations | | | | | | | |
| Total Revenue from clients | | | | | | | |
| | | | | | | | |
| NETWORKING EVENTS/ Groups | | | | | | | |
| Events | | | | | | | |
| Networking Meetings | | | | | | | |
| Appointments generated | | | | | | | |
| | | | | | | | |
| PROSPECTING | | | | | | | |
| Calls | | | | | | | |
| Appointments generated | | | | | | | |
| Foot canvassing calls | | | | | | | |
| Appointments generated | | | | | | | |
| Net new appointments | | | | | | | |
| | | | | | | | |
| CENTERS OF INFLUENCE | | | | | | | |
| Appointments | | | | | | | |
| Referrals Generated | | | | | | | |
| | | | | | | | |
| TOP 50 PROGRAM | | | | | | | |
| Letters sent | | | | | | | |
| Emails | | | | | | | |
| | | | | | | | |
| LINKEDIN | | | | | | | |
| Complete profile | | | | | | | |
| Add new linkedin contacts | | | | | | | |
| Get linkedin recommendations | | | | | | | |
| Referrals generated | | | | | | | |
| | | | | | | | |
| RESULTS | | | | | | | |
| Proposals | | | | | | | |

| Sales | | | | | | | |
|-------|---|---|---|---|---|---|---|
| Total revenues | | | | | | | |

| Actual Week 3 | Actual Week 4 | Actual Week 5 | Actual Week to Month |
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