



**DAVID MONROE, CCIM**  
Multifamily Brokerage Investment And Consulting

# Quarterly Planner

Published By: David Monroe, CCIM



**David Monroe, CCIM's Quarterly Planner**

Published by  
**Premier Apartment Services, LLC**  
2655B Old Shell Rd  
Mobile, AL 36607

Copyright © 2018 by David Monroe, CCIM

Published By Premier Apartment Services, LLC Mobile, Alabama

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, 978-750-8400, fax 978-646-8600. Requests to the Publisher for permission should be addressed to David Monroe, CCIM, 6613 Chimney Top Dr S Mobile, Alabama 36695, 888-244-6051, fax 251-308-1665, or online at [www.davidmonroeccim.com](http://www.davidmonroeccim.com)

**LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.**

For general information on our other products and services, please contact our Customer Support at 888-244-6051, or fax 251-308-1665.

For technical support, please visit <https://davidmonroeccim.kartra.com/help/customer-support>.

Library of Congress Control Number: 2018967510

ISBN: 978-0-578-43483-4

Manufactured in the United States of America



In this first segment of your annual review, we will take a look back at your production in 20\_\_\_\_. This will lay the ground work for reflection and ultimately our planning for 20\_\_\_\_.

## 1. Review of Last Year's Goals

### (a) Lead Generation Efforts

### (b) Top 10 Lead Sources

### (c) Lead Conversion Efforts

### (d) Top 10 Clients

## 2. Reflect on Last Year's Efforts

(a) Where Were You Successful

(b) Where Did You Struggle

(c) What Were Your Most Productive Activities

(d) What Were Your Most Unproductive Activities

### 3. Planning

**(a) How Much Do You Need to Make**

**(b) What's Your Average Deal Size**

**(c) What's Average Deal Commission/Acquisition Fee**

**(d) How Many Deals Do You Need to Close**

<h1>Annual</h1>	Date: _____
-----------------	-------------

## 4. Set 3 To 10 Annual Goals

1.	_____
	_____
	_____
2.	_____
	_____
	_____
3.	_____
	_____
	_____
4.	_____
	_____
	_____
5.	_____
	_____
	_____
6.	_____
	_____
	_____
7.	_____
	_____
	_____
8.	_____
	_____
	_____
9.	_____
	_____
	_____
10.	_____
	_____
	_____

The first step toward developing your 12 month personal and business goals is to establish your 12 month financial goal (refer to your Business Pipeline). This represents your net income from closed transactions during the 12 month period. My financial goal for the 12 month period is \$\_\_\_\_\_. Based on this financial goal, I need to complete approximately \_\_\_\_\_ transactions at \$\_\_\_\_\_ net per transaction.



**\_\_ Quarter**      Date: \_\_\_\_\_

**Goal #1**

---

---

---

---

---

---

---

---

**What is motivating this Goal?**

---

---

---

---

---

---

---

---

**Action Steps I need to take to reach this Goal**

---

---

---

---

---

---

---

---

**Dream Clients**

Contact 13 Category A Highest Paying Clients this Quarter (One each week)

Contact 13 Category B Highest Paying Clients this Quarter (One each week)

Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

---

---

---

---

---

---

---

---























<b>__ Quarter</b> Date:
-------------------------

<b>Goal #10</b>

<b>What is motivating this Goal?</b>

<b>Action Steps I need to take to reach this Goal</b>

<b>Dream Cients</b>
Contact 13 Category A Highest Paying Clients this Quarter (One each week)
Contact 13 Category B Highest Paying Clients this Quarter (One each week)
Contact 13 Category C Highest Paying Clients this Quarter (One each week)

<b><u>Notes:</u></b>



\_\_ Quarter Date:

**Highest Paying Clients**  
**Category A: \_\_\_\_\_**

I need to reach 13 Category A Highest Paying Clients this Quarter

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



**\_\_ Quarter**    Date: \_\_\_\_\_

**Highest Paying Clients**  
**Category B: \_\_\_\_\_**

I need to reach 13 Category B Highest Paying Clients this Quarter

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



\_\_ Quarter Date:

**Highest Paying Clients**  
**Category C: \_\_\_\_\_**

I need to reach 13 Category C Highest Paying Clients this Quarter

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



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 1</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 1

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1 \_\_\_\_\_

2. \_\_\_\_\_

3 \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

<b>Did I Contact My Highest Paying Client's?</b>	
Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:





# Monday

Date: \_\_\_\_\_  
Week 1

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
Tuesday      **Week 1**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_

# Wednesday

Week 1

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: \_\_\_\_\_ Week 1

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 1</b>
--------	-------------------------------

3 Biggest Goals Today
1
2.
3

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 1**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





<h1 style="margin: 0;">Sunday</h1>	<p><b>Date:</b> <b>Week 1</b></p>
------------------------------------	---------------------------------------

<b><u>REST:</u></b>	
<b>Am I sleeping enough? Do I need more Sleep?</b>	
Average Amount of Sleep A Night:	Is this Optimal?
Average Nap Time each day:	Is this Optimal?
<b>What Can I do to ensure I'm getting optimal sleep each night:</b>	

<b><u>FAMILY</u></b>	
<b>Am I taking enough time out of my week for my family?</b>	
Average time with family each week day:	Is this Optimal?
Average time with family on weekends:	Is this Optimal?
<b>What can I do to improve family time?</b>	

<b><u>HEALTH</u></b>			
<b>Am I eating right and excercising as I should?</b>			
Daily eating habits:		Daily Exercise:	
Poor	Fair	Poor	Fair
Good	Excelent	Good	Excelent

<b>Other Tasks</b>	





<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 2
--	-----------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 2

Date:

**Review: How Did I Do This Week?**

---

---

---

**Reflect: What Can I Do Better Next Week?**

---

---

---

**3 Biggest Goals This Week**

1

---

2.

---

3

---

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:

---

---

---



# Monday

Date:   
 Week 2

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
Tuesday      **Week 2**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 2**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date:   
**Thursday**   
Week 2

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 2</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 2**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 3</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 3

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:



# Monday

Date:   
 Week 3

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 3**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_  
**Wednesday**      **Week 3**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: Week 3

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 3</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 3**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 4</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 4

Date:

**Review: How Did I Do This Week?**

---

---

---

**Reflect: What Can I Do Better Next Week?**

---

---

---

**3 Biggest Goals This Week**

1

---

2.

---

3

---

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:

---

---

---



<h1 style="margin: 0;">Monday</h1>	<p style="margin: 0;">Date:</p> <p style="margin: 0; font-size: 1.2em;">Week 4</p>
------------------------------------	--

3 Biggest Goals Today
1
2.
3

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







**Tuesday**      Date: \_\_\_\_\_  
Week 4

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_

# Wednesday

Week 4

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: \_\_\_\_\_ Week 4

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 4</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: **Saturday** Week 4

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





<h1 style="margin: 0;">Sunday</h1>	<p><b>Date:</b> <b>Week 4</b></p>
------------------------------------	---------------------------------------

<b><u>REST:</u></b>	
<b>Am I sleeping enough? Do I need more Sleep?</b>	
Average Amount of Sleep A Night:	Is this Optimal?
Average Nap Time each day:	Is this Optimal?
<b>What Can I do to ensure I'm getting optimal sleep each night:</b>	

<b><u>FAMILY</u></b>	
<b>Am I taking enough time out of my week for my family?</b>	
Average time with family each week day:	Is this Optimal?
Average time with family on weekends:	Is this Optimal?
<b>What can I do to improve family time?</b>	

<b><u>HEALTH</u></b>			
<b>Am I eating right and exercising as I should?</b>			
Daily eating habits:		Daily Exercise:	
Poor	Fair	Poor	Fair
Good	Excelent	Good	Excelent

<b>Other Tasks</b>	





<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 5</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 5

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1 \_\_\_\_\_

2. \_\_\_\_\_

3 \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

<b>Did I Contact My Highest Paying Client's?</b>	
Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:



Date: \_\_\_\_\_  
**Monday**      **Week 5**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 5**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: **Wednesday**  
Week 5

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday

Date:   
 Week 5

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 5</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 5**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 6
--	-----------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 6

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:



# Monday

Date: \_\_\_\_\_  
Week 6

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
Tuesday      **Week 6**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: **Wednesday**  
Week 6

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_  
**Thursday**      **Week 6**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 6</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 6**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





<h1 style="margin: 0;">Sunday</h1>	<p><b>Date:</b> <b>Week 6</b></p>
------------------------------------	---------------------------------------

<b><u>REST:</u></b>	
<b>Am I sleeping enough? Do I need more Sleep?</b>	
Average Amount of Sleep A Night:	Is this Optimal?
Average Nap Time each day:	Is this Optimal?
<b>What Can I do to ensure I'm getting optimal sleep each night:</b>	

<b><u>FAMILY</u></b>	
<b>Am I taking enough time out of my week for my family?</b>	
Average time with family each week day:	Is this Optimal?
Average time with family on weekends:	Is this Optimal?
<b>What can I do to improve family time?</b>	

<b><u>HEALTH</u></b>			
<b>Am I eating right and excercising as I should?</b>			
Daily eating habits:		Daily Exercise:	
Poor	Fair	Poor	Fair
Good	Excelent	Good	Excelent

<b>Other Tasks</b>	

# Notes:



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 7</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 7

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

<b>Did I Contact My Highest Paying Client's?</b>	
Category A	<input type="checkbox"/>
Category B	<input type="checkbox"/>
Category C	<input type="checkbox"/>

Notes:



**Monday**      **Date:**  
**Week 7**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
Tuesday      **Week 7**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 7**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday

Date:   
 Week 7

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





<h1 style="margin: 0;">Friday</h1>	<p><b>Date:</b> <b>Week 7</b></p>
------------------------------------	---------------------------------------

3 Biggest Goals Today
1
2.
3

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 7**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ <b>Week 8</b>
--	------------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 8

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:



Date: \_\_\_\_\_  
**Monday**      **Week 8**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 8**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 8**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date:   
**Thursday**   
Week 8

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Friday**      **Date:**  
**Week 8**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 8**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 9
--	-----------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 9

Date:

**Review: How Did I Do This Week?**

---

---

---

**Reflect: What Can I Do Better Next Week?**

---

---

---

**3 Biggest Goals This Week**

1

---

2.

---

3

---

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:

---

---

---



**Date:**  
**Monday**      **Week 9**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 9**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: **Wednesday**  
Week 9

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: Week 9

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 9</b>
--------	-------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 9**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 10
--	------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 10

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:



# Monday

Date: \_\_\_\_\_  
Week 10

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 10**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: **Wednesday** **Week 10**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: Week 10

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Friday**      **Date:**  
**Week 10**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: **Saturday** Week 10

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 11
--	------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 11

Date:

**Review: How Did I Do This Week?**

---

---

---

**Reflect: What Can I Do Better Next Week?**

---

---

---

**3 Biggest Goals This Week**

1

---

2.

---

3

---

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:

---

---

---



**Monday**      **Date:**  
**Week 11**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 11**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: **Wednesday**  
Week 11

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday Date: Week 11

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





<h1 style="margin: 0;">Friday</h1>	<p style="margin: 0;"><b>Date:</b> <b>Week 11</b></p>
------------------------------------	---

3 Biggest Goals Today
1
2.
3

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







**Saturday**      Date: \_\_\_\_\_  
Week 11

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 12
--	------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 12

Date: \_\_\_\_\_

**Review: How Did I Do This Week?**

**Reflect: What Can I Do Better Next Week?**

**3 Biggest Goals This Week**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:



# Monday

Date:

Week 12

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Tuesday**      **Week 12**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_

# Wednesday

Week 12

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_  
**Thursday**      **Week 12**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 12</b>
--------	--------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 12**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 13
--	------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	



# Week 13

Date:

**Review: How Did I Do This Week?**

---

---

---

**Reflect: What Can I Do Better Next Week?**

---

---

---

**3 Biggest Goals This Week**

1

---

2.

---

3

---

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My Highest Paying Client's?**

Category A

Category B

Category C

Notes:

---

---

---



**Monday**      **Date:**  
**Week 13**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







# Tuesday

Date: \_\_\_\_\_  
Week 13

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_

# Wednesday

Week 13

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Thursday

Date: \_\_\_\_\_  
Week 13

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Friday	<b>Date:</b> <b>Week 13</b>
--------	--------------------------------

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







Date: \_\_\_\_\_  
**Saturday**      **Week 13**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30







\_ **Quarter**     Date: \_\_\_\_\_

**Goals This Quarter & were they accomplished?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

**Review: How Did I Do This Quarter?**

---

---

---

---

---

---

---

---

**Reflection: What Can I Do Better Next Quarter?**

---

---

---

---

---

---

---

---

**Total Quarterly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

<b>Did I Contact My Highest Paying Client's?</b>	
13 Category A	<input type="radio"/>
13 Category B	<input type="radio"/>
13 Category C	<input type="radio"/>

**Notes:**

















