

Goal

Appointments

Presentations

Sales

A1P

A/H

Total AP

Total Apps

Referral Present.

Headstart Plans

Referrals Obt.

Referrals Sold

Days Worked

Advance

First Year's Com.

Renewals

Total Potential Inc.

Lead Pt. Avg.

Credits

Used Leads

New Ld. Pt. Avg.

New Referrals T.I.

L

Officer Reports

M

Drop Bys

Areas

Leads-Beginning Inventory

Hard Cards

List Leads

POS

Refer Alerts

Referrals

Total

1

A

B

H

Stubs

C

D

I

Returns N/G

E

F

G

J

Good Lds.

K

Total Returns

2

New Leads
Picked Up

3

New Inv.

4

N

O

P

Q

R

1 - 2 + 3 = 4

AGENT'S WEEKLY PLANNING AND ACTIVITY RECORD

AGENT

WEEK OF

DAY			DAY	
	NAME	STAT		NAME
8:00			8:00	
8:30			8:30	
9:00			9:00	
9:30			9:30	
10:00			10:00	
10:30			10:30	
11:00			11:00	
11:30			11:30	
12:00			12:00	
12:30			12:30	
1:00			1:00	
1:30			1:30	
2:00			2:00	
2:30			2:30	
3:00			3:00	
3:30			3:30	
4:00			4:00	
4:30			4:30	
5:00			5:00	
5:30			5:30	
6:00			6:00	
6:30			6:30	
7:00			7:00	
7:30			7:30	
8:00			8:00	
8:30			8:30	
9:00			9:00	
9:30			9:30	
10:00			10:00	
APPT			APPT	
PRES			PRES	
SALES			SALES	
ALP			ALP	
A & H			A & H	
REF			REF	

MILEAGE _____ MILEAGE _____

DAY			DAY	
	NAME	STAT		NAME
8:00			8:00	
8:30			8:30	
9:00			9:00	
9:30			9:30	
10:00			10:00	
10:30			10:30	
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8:00			8:00	
8:30			8:30	
9:00			9:00	
9:30			9:30	
10:00			10:00	
APPT			APPT	
PRES			PRES	
SALES			SALES	
ALP			ALP	
A & H			A & H	
REF			REF	

MILEAGE _____ MILEAGE _____

DAY			DAY	
	NAME	STAT		NAME
8:00			8:00	
8:30			8:30	
9:00			9:00	
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8:30			8:30	
9:00			9:00	
9:30			9:30	
10:00			10:00	
APPT			APPT	
PRES			PRES	
SALES			SALES	
ALP			ALP	
A & H			A & H	
REF			REF	

MILEAGE _____ MILEAGE _____
