



# DAILY ACTION TRACKER

## User Guide

The Daily System Behind Consistent Mortgage  
Production

Consistent Daily Action Creates Predictable Success

VYKON Success Systems  
Impact Your Way



## User Guide

The VYKON Daily Action Tracker is designed to help professionals focus on the activities that create consistent results. Instead of only measuring outcomes, this system tracks the daily actions that build relationships, create opportunity, and generate long term business growth.

VYKON Principle: Consistent daily activity creates predictable success.

### 1. Start With the Day

Write the current day at the top of the tracker. Completing this sheet each business day builds accountability and helps you measure consistency over time.

### 2. Track Your Relationship Calls

- Partner Calls - Conversations with Realtors, builders, financial advisors, or other referral partners.
- Lead | Client Calls - Follow up calls with leads, active borrowers, or past clients.
- Referrals From Calls - When a conversation results in a referral, check this box.

### 3. Track Daily Activities

- Partner Calls - Strengthening referral relationships.
- Lead | Client Calls - Moving borrowers forward in their mortgage journey.
- Consultations - Mortgage strategy conversations with buyers, refinancers, or investors.
- Live Meetings - In person or Zoom meetings with partners or clients.
- Annual Reviews - Mortgage checkups with past clients.
- On Time - Mark this if you started your day focused and on schedule.

### 4. Record Daily Results

- Leads - New people interested in a mortgage conversation.
- Applications - Loan applications received.
- Sent to Processing - Loans submitted to operations.
- Locked Loans - Loans with a rate lock.
- Funded Loans - Loans that have closed successfully.



## **5. Evaluate Your Day**

At the bottom of the tracker, evaluate how your day went:

- Proactive – You controlled your schedule and executed your planned activities.
- Reactive – Your day was driven mostly by incoming requests and interruptions.

## **6. Track Completion Time**

Mark when your proactive activities were completed:

- Before Noon – Top performers complete their proactive work early.
- After Noon – Remaining activities were finished later in the day.

## **The VYKON 6 | 1 | 6 | 1 Client Care System**

The VYKON system focuses on building lifelong relationships with every client. After a borrower closes their loan, schedule four strategic follow ups.

- 6 Days After Closing

Check in to make sure the move and closing process went smoothly.

- 1 Month After Closing

Follow up once the client has settled into their home.

- 6 Months After Closing

Provide a market update and discuss equity or financial strategy.

- 1 Year After Closing

Conduct an Annual Mortgage Review to evaluate rates, equity, and future opportunities.

## **Adding Follow Ups to Your Calendar**

Each time a loan closes, immediately schedule the four 6 | 1 | 6 | 1 follow ups in your calendar.

On the tracker, check the box labeled “6 | 1 | 6 | 1 Added to Calendar.” This ensures no client ever falls through the cracks.

## **The VYKON Philosophy**

Your database is not simply a list of past clients. It is a community of people you continue to serve. By consistently completing the activities in this tracker and maintaining long term relationships, your business will grow through trust, referrals, and lasting impact.

## **Impact Your Way.**

Day:

Partner Calls:

              

Lead | Client Calls

              

Referrals | From Calls

              

## DAILY ACTIVITIES

Partner Calls

Lead | Client Calls

Consultations

Live Meetings

Annual Reviews

On Time

## DAILY RESULTS

Leads

Applications

Sent to Processing

Locked Loans

Funded Loans

6| 1| 6| 1| Added to Calendar

Today Was:

PROACTIVE

REACTIVE

Completed:

BEFORE | Noon

AFTER | Noon