



Partner Calls:

Lead | Client Calls

Referrals | From Calls

DAILY ACTIVITIES

Partner Calls

Lead | Client Calls

Consultations

Annual Reviews

Live Meetings

On Time

DAILY RESULTS

Leads

Applications

Sent to Processing

Locked Loans

Funded Loans

Follow Up Added

Today Was:

PROACTIVE

REACTIVE

Completed:

BEFORE | Noon

AFTER | Noon