



## Daily and Weekly Activity

### Activities

Area	Total
Did you work Social Media? Engagement Postings (SM Folder)?	
How many emails did you send – Clients and/or partners?	
How many people did you approach in your warm market?	
How many businesses did you visit?	
Chamber of Commerce, Associations, and organization meetings attended (networking)	
Finance, Procurement Association Meetings Attended	
How many business cards and flyers did you leave out?	
How many follow-up calls were made to those you have contacted before?	
How many leads did you purchase?	
How many appointments did you purchase?	
How many people did you approach to refer to you clients?	
Did you conduct meetings with your referrals, network, people you know, etc.?	
How many other things did you do?	



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### Prospecting Activities

How many prospects did you contact from your activities?	Notes

### Team Activities

How many Referrers did you share Above the Standard with?	Notes
Did you conduct a call with each person / organization to maintain goal setting, planning, and results?	
Did you help your people with relationship, marketing, and business development?	

### Referring Activities

How many referrers did you enroll (CPA firms, accounting firms, business consultants, insurance agents, realtors, brokers, etc.)?	Notes
Did you follow-up with others in the way of customer service?	



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### Weekly Appointments

How many appointments did you arrange?	Notes
How many appointments did you arrange and others in your network arrange?	
How many appointments were kept?	
Notes	

### Weekly Client Sales Closed

From your appointments, how many prospects became clients?	

### New Client Projects Started

How many new client projects were started?	Notes



**Daily and Weekly Activity**

**What areas need changing, improved upon, and added to improve performance?**

List the areas, provide solutions, and activate	Notes

**30+ years growing people, procurement, and projects!**