

# ANNUAL ACTIONS

Agent:

Year:

## QUARTERLY CHARITIES:

JANUARY	Date: Event:	JULY	Date: Event:
FEBRUARY	Date: Event:	AUGUST	Date: Event:
MARCH	Date: Event:	SEPTEMBER	Date: Event:
APRIL	Date: Event:	OCTOBER	Date: Event:
MAY	Date: Event:	NOVEMBER	Date: Event:
JUNE	Date: Event:	DECEMBER	Date: Event:

**NETWORKING EVENTS:** EX: AJI social, Chamber, Any Personal, Networking event, business affiliated, SBRG TSRG Ch.

JANUARY	Date: Event:	JULY	Date: Event:
FEBRUARY	Date: Event:	AUGUST	Date: Event:
MARCH	Date: Event:	SEPTEMBER	Date: Event:
APRIL	Date: Event:	OCTOBER	Date: Event:
MAY	Date: Event:	NOVEMBER	Date: Event:
JUNE	Date: Event:	DECEMBER	Date: Event:

## ANNUAL BUSINESS PLAN/GOALS:

Agent:

Year:

By the end of JANUARY		By the end of JULY	
By the end of FEBRUARY		By the end of AUGUST	
By the end of MARCH		By the end of SEPTEMBER	
By the end of APRIL		By the end of OCTOBER	
By the end of MAY		By the end of NOVEMBER	
By the end of JUNE		By the end of DECEMBER	

# MONTHLY ACTIONS

Agent: \_\_\_\_\_

Month: \_\_\_\_\_

1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24
25	26	27	28
29	30	31	

## MONTHLY GOALS:

<p>Webinar's Scheduled (AJI or NSDCAR) _____</p> <p>Power Hours Scheduled (Track #of clients contacted) _____</p> <p>Open Homes Scheduled (Track addresses) _____</p> <p>Market Stats to Sphere &amp; Past Clients <input type="checkbox"/></p> <p>Newsletter to Sphere (clientdirect.com) <input type="checkbox"/></p> <p>FARM—Postcards (At least 250—Express Copy) <input type="checkbox"/></p>	<p><b>XTRA:</b> _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
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# NEW LEADS GENERATED

Agent: \_\_\_\_\_

Month: \_\_\_\_\_

Goal: \_\_\_\_\_

Achieved: \_\_\_\_\_

NAME OF LEAD	PHONE #	EMAIL	SOURCE	AREA OF INTEREST



# WEEKLY PROSPECTING ACTIONS

Agent: \_\_\_\_\_

Weekly: \_\_\_\_\_

Week of \_\_\_\_\_ Goals: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Small Business Group/Chamber Meeting Attended:

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

Where: \_\_\_\_\_

At LEAST 2 Social Media Posts

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

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

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

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

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

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



Weekly Caravan (Date/City): \_\_\_\_\_

Notes/Properties of Interest (pitched):

Address:	Notes:

Set 3 Appts: (lunch dates & coffee appts. can be included!)

Date:	Name:	Location:

# WEEKLY PROSPECTING ACTIONS

Agent:

Weekly:

PREVIEW 5 PROPERTIES:

Date	For Who/ Client?	Address	Notes
	1.		
	2.		
	3.		
	4.		
	5.		

DOOR KNOCK (DROP-BY) 20 HOMES:

Date	Street/City	House#	Name	Notes
			1.	
			2.	
			3.	
			4.	
			5.	
			6.	
			7.	
			8.	
			9.	
			10.	
			11.	
			12.	
			13.	
			14.	
			15.	
			16.	
			17.	
			18.	
			19.	
			20.	

# DAILY PROSPECTING ACTIONS

Agent: \_\_\_\_\_

Daily: \_\_\_\_\_

DAILY GOALS (Calendar: update w/Big Blocks):

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## 5 HANDWRITTEN NOTES:

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

## HAND OUT 5 BUSINESS CARDS:

1.
2.
3.
4.
5.

SPEND 2 HOURS PROSPECTING (general description & hours):

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APPOINTMENTS SET UP: \_\_\_\_\_

GOAL: \_\_\_\_\_

ACHIEVED: \_\_\_\_\_

Date	Name	Location



