**FNTG Elite VIP Coaching**

Monthly Success Tracker - October 2016

| | | M | T | W | TH | F | M | T | W | TH | F | M | T | W | TH | F | M | T | W | TH | F | M |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 3-Oct | 4-Oct | 5-Oct | 6-Oct | 7-Oct | 10-Oct | 11-Oct | 12-Oct | 13-Oct | 14-Oct | 17-Oct | 18-Oct | 19-Oct | 20-Oct | 21-Oct | 24-Oct | 25-Oct | 26-Oct | 27-Oct | 28-Oct | 31-Oct |
| ↓ | Timeblock Calls/Emails/Reach 150 (Daily "Fast Fifteen") | | | | | | | | | | | | | | | | | | | | | |
| Touch Point Calls | Call to Directing Agent at Open | | | | | | | | | | | | | | | | | | | | | |
| | Call to Non-Directing Agent/Lender at Sale | | | | | | | | | | | | | | | | | | | | | |
| | Call to Agents/Lender at Close | | | | | | | | | | | | | | | | | | | | | |
| | Call to Agents 12 Days Prior to Close | | | | | | | | | | | | | | | | | | | | | |
| | Call to Agents at Prelim Review with Status if Red Flags | | | | | | | | | | | | | | | | | | | | | |
| | Recap of the Day Call to both Agents" | | | | | | | | | | | | | | | | | | | | | |
| Touch Point Emails | Email to Directing Agent at Open | | | | | | | | | | | | | | | | | | | | | |
| | Email to Non-Directing Agent/Lender at Sale | | | | | | | | | | | | | | | | | | | | | |
| | Closing Soon Email to Both Agents and Lender 12 Days Prior to Close | | | | | | | | | | | | | | | | | | | | | |
| | Email to Agents at Prelim Review with Status if No Red Flags | | | | | | | | | | | | | | | | | | | | | |
| | Reach 150 Request via Site to Agents/Lender/Principal/TCs and/or Assistants at Close | | | | | | | | | | | | | | | | | | | | | |
| | Thank you Cards to both agents at close | | | | | | | | | | | | | | | | | | | | | |
| Sales | Meeting with Sales to discuss Cross Sales leads and Targets - Make Target Calls | | | | | | | | | | | | | | | | | | | | | |
| | Have Sales send out your campaign card | | | | | | | | | | | | | | | | | | | | | |
| Organization & Efficiency | Utilize SmartView | | | | | | | | | | | | | | | | | | | | | |
| | Utilize EPU | | | | | | | | | | | | | | | | | | | | | |
| | Set expectations on email response times | | | | | | | | | | | | | | | | | | | | | |
| | Daily Huddle + Weekly Meeting (OR personal success list) | | | | | | | | | | | | | | | | | | | | | |
| | Focus! (1 task at a time and 100% attention on phone calls) | | | | | | | | | | | | | | | | | | | | | |
| Extras | Client Retention Emails Send 5 on either Monday or Friday. You choose. | | | | | | | | | | | | | | | | | | | | | |
| | Think of Class to Schedule | | | | | | | | | | | | | | | | | | | | | |
| | Schedule PEP Meetings with 1-2 existing clients per week and all new clients | | | | | | | | | | | | | | | | | | | | | |
| | Ask 5 Existing Clients to refer you to someone in their office | | | | | | | | | | | | | | | | | | | | | |
| Don't Forget! | Take credit for your brilliance! | | | | | | | | | | | | | | | | | | | | | |
| | Keep personality styles in mind when working with others! | | | | | | | | | | | | | | | | | | | | | |
| | Dress for Success! | | | | | | | | | | | | | | | | | | | | | |
| | Remember to smile and watch tonality on the phone! | | | | | | | | | | | | | | | | | | | | | |
| | Remember your email etiquette! | | | | | | | | | | | | | | | | | | | | | |