FNTG Elite VIP Coaching

Monthly Success Tracker - January 2017

OPEN ORDER GOAL FOR THIS MONTH: Sales:	/ Refis:	/ Total:	

		М	Т	W	TH	F	М	Т	W	TH	F	М	Т	W	TH	F	М	T	W	TH	F	М	Т	W	TH	F
_		2-Jan	3-Jan	4-Jan	5-Jan	6-Jan	9-Jan	10-Jan	11-Jan	12-Jan	13-Jan	16-Jan	17-Jan	18-Jan	19-Jan	20-Jan	23-Jan	24-Jan	25-Jan	26-Jan	27-Jan	30-Jan	31-Jan	1-Feb	2-Feb	3-Feb
\downarrow	Timeblock Calls/Emails/Reach 150 (Daily "Fast Fifteen")																									
	Call to Directing Agent at Open																									
s e	Call to Non-Directing Agent/Lender at Sale																									
oint C	Call to Agents/Lender at Close																									
Touch Point Calls	Call to Agents 12 Days Prior to Close																									
P	Call to Agents at Prelim Review with Status if Red Flags																									
	Recap of the Day Call to both Agents"																									
	Email to Directing Agent at Open																									
ails	Email to Non-Directing Agent/Lender at Sale																									
int Em	Closing Soon Email to Both Agents and Lender 12 Days Prior to Close																									
Touch Point Emails	Email to Agents at Prelim Review with Status if No Red Flags																									
Tou	Reach 150 Request via Site to Agents/Lender/Principal/TCs at Close																									
	Thank you Cards to both agents at close																									
es	Meeting with Sales to discuss Cross Sales leads and Targets - Make Target Calls																									
Sales	Have Sales send out your campaign card																									
ncy	Utilize SmartView																									
Efficie	Utilize EPU																									
on &	Set expectations on email response times																									
Organization & Efficiency	Daily Huddle + Weekly Meeting (OR personal success list)																									
Orga	Focus! (1 task at a time and 100% attention on phone calls)																									
	Client Retention Emails Send 5 on either Monday or Friday. You choose.																									
se	Think of Class to Schedule																									
Extras	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																									
	Take credit for your brilliance!																									
şet!	Keep personality styles in mind when working with others!																									
Don't Forget!	Dress for Success!																									
Don	Remember to smile and watch tonality on the phone!																									
	Remember your email etiquette!																									