FNTG Elite VIP Coaching

Monthly Success Tracker - *August 2017*

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

ACTUAL # OPEN ORDERS FOR THIS MONTH: Sales: _____ / Refis: _____ / Total: _____

		M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F	M	T	W	TH	F
		31-Jul	1-Aug	2-Aug	3-Aug	4-Aug	7-Aug	8-Aug	9-Aug	10-Aug	11-Aug	14-Aug	15-Aug	16-Aug	17-Aug	18-Aug	21-Aug	22-Aug	23-Aug	24-Aug	25-Aug	28-Aug	29-Aug	30-Aug	31-Aug	1-Sep
↓	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 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.																									
	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!																									