

# Compass Foundation for Growth

**Set Financial Goals**

Total Annual/Requirement ..... \_\_\_\_\_

Less: Estimated Renewals/Residual Income..... \_\_\_\_\_

Other Income ..... \_\_\_\_\_

Income required from the new business ..... \_\_\_\_\_

Estimated Value of sale to clients meeting your profile ..... \_\_\_\_\_

Number of new sales required (annually) ..... cases/year

Number of new sales required (monthly) .....months cases/month

Number of new sales required (weekly) .....weeks cases/week

**Weekly Tracker for \_\_\_\_\_**

Week Of	Cases	Rev (FYC)	Calls	Appt. Made	SC Open	Pres. Close	Intro Referral
<b>Activity Goal/Week</b>							
<b>Qtrly Total</b>							
<b>Qtr Wkly Avg</b>							





## How Do You Spend Your Day?

Please jot down all of the activities you do in a day and state the amount of time it takes for you to do it. The purpose of this sheet is to help understand the activities you do.

Day Time	Monday	Tuesday	Wednesday	Thursday	Friday	Sat / Sun
Before 8:30						
8:30						
9:00						
9:30						
10:00						
10:30						
11:00						
11:30						
12:00						
1:00						
1:30						
2:00						
2:30						
3:00						
3:30						
4:00						
4:30						
After 5:00						



## Activity Record

Activity Day	Referrals	Phone Calls Made	Appointment Scheduled	Opening Meetings	Cases Opened	Closing Meetings	Cases Closed	FYC
Monday								
Tuesday								
Wednesday								
Thursday								
Friday								
Saturday								
Sunday								
Week Total								

# Planning Your Week



NAME:		WEEK OF:					
	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
	<b>A WINNING WEEK</b>						
6:00							
7:00							
8:00	Education	PHONE	Education	PHONE	Administration	Phoning Appts. Paperwork Reading Planning for Next Week	
9:00							
10:00	APPT.	APPT.	APPT.	APPT.	APPT.		
11:00							
12:00	BUSINESS LUNCH	BUSINESS LUNCH	BUSINESS LUNCH	BUSINESS LUNCH	BUSINESS LUNCH		
1:00							
2:00	APPT.	APPT.	APPT.	APPT.	APPT.		
3:00							
4:00	APPT.		APPT.		APPT.		
5:00							
6:00	<b>PHONING (GOAL OF FIFTEEN APPTS. IN NEXT FIVE DAYS)</b>	PHONE	PHONE	PHONE		<b><u>THE WINNING SYSTEM</u></b>  10 New Contacts/Day 6 Referrals/Day 2 Openers/Day 1 Close/Day 2-3 Sales/Week 2-3 Hrs. Self-Study/Week  10 New Applied Life &DI/Month 100-150 Sales/Year	
7:00							
8:00		APPT.		APPT.			
9:00							
10:00							
11:00							



# Planning and Tracking for Success

THINGS TO DO				Sunday	
				9:00	
				9:30	
				10:00	
				10:30	
				11:00	
				11:30	
				12:00	
				12:30	
				1:00	
				1:30	
				2:00	
				2:30	
				3:00	
				3:30	
				4:00	
				4:30	
				5:00	
				5:30	
				6:00	
Time	Thursday		Friday		Saturday
8:00					
8:30					
9:00					
9:30					
10:00					
10:30					
11:00					
11:30					
12:00					
12:30					
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