

# Quarterly Planner

**For Real Estate Sales**

# Annual

Date:

In this first segment of your annual review, we will take a look back at your production in 20\_\_\_\_. This will lay the ground work for reflection and ultimately our planning for 20\_\_\_\_.

## 1. Review of Last Year's Goals

(a) Lead Generation Efforts

(b) Top 10 Lead Sources

(c) Lead Conversion Efforts

(d) Top 10 Clients

**Annual**

Date:

## 2. Reflect on Last Year's Efforts

(a) Where Were You Successful

(b) Where Did You Struggle

(c) What Were Your Most Productive Activities

(d) What Were Your Most Unproductive Activities

**Annual**

Date:

### **3. Planning**

**(a) How Much Do You Need to Make**

**(b) What's Your Average Deal Size**

**(c) What's Average Deal Commission/Acquisition Fee**

**(d) How Many Deals Do You Need to Close**

# Annual

Date:

## 4. Set 7 To 10 Annual Goals

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

The first step toward developing your 12 month personal and business goals is to establish your 12 month financial goal (refer to your Business Pipeline). This represents your net income from closed transactions during the 12 month period. My financial goal for the 12 month period is \$\_\_\_\_\_. Based on this financial goal, I need to complete approximately \_\_\_\_\_ transactions at \$\_\_\_\_\_ net per transaction.

**\_\_ Quarter**    Date:

**Goal #1**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #2**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #3**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #4**


**What is motivating this Goal?**


**Action Steps I need to take to reach this Goal**


- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**


**\_\_ Quarter**    Date:

**Goal #5**


**What is motivating this Goal?**


**Action Steps I need to take to reach this Goal**


- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #6**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #7**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date:

**Goal #8**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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<b>__ Quarter</b> Date:
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<b>Goal #9</b>

<b>What is motivating this Goal?</b>

<b>Action Steps I need to take to reach this Goal</b>

<b>Dream Clients</b>
Contact 13 Category A Highest Paying Clients this Quarter (One each week)
Contact 13 Category B Highest Paying Clients this Quarter (One each week)
Contact 13 Category C Highest Paying Clients this Quarter (One each week)

<b><u>Notes:</u></b>

**\_\_ Quarter**    Date:

**Goal #10**

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**What is motivating this Goal?**

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**Action Steps I need to take to reach this Goal**

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- Dream Clients**
- Contact 13 Category A Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category B Highest Paying Clients this Quarter (One each week)
  - Contact 13 Category C Highest Paying Clients this Quarter (One each week)

**Notes:**

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**\_\_ Quarter**    Date: \_\_\_\_\_

**Highest Paying Clients**  
**Category A: \_\_\_\_\_**

I need to reach 13 Category A Highest Paying Clients this Quarter

1.	
2.	
3	
4	
5	
6	
7	
8	
9	
10.	
11.	
12.	
13.	



\_\_ Quarter Date:

**Highest Paying Clients**  
**Category B: \_\_\_\_\_**

I need to reach 13 Category B Highest Paying Clients this Quarter

1.	
2.	
3	
4	
5	
6	
7	
8	
9	
10.	
11.	
12.	
13.	

\_\_ Quarter Date:

**Highest Paying Clients**  
**Category C: \_\_\_\_\_**

I need to reach 13 Category C Highest Paying Clients this Quarter

1.	
2.	
3	
4	
5	
6	
7	
8	
9	
10.	
11.	
12.	
13.	

<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 1
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**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 1

Date:

**Review: How Did I Do This Week?**

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**Reflect: What Can I Do Better Next Week?**

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**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

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# Monday

Date:  
Week 1

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 1

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 1**

**3 Biggest Goals Today**

1

2.

3

**Other Tasks**

**Appointments**

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 1

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 1

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday

Date:  
Week 1

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 1

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 2
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**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 2

Date:

**Review: How Did I Do This Week?**

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**Reflect: What Can I Do Better Next Week?**

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**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

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# Monday

Date:  
Week 2

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 2

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





Date: \_\_\_\_\_  
**Wednesday**      **Week 2**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 2

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 2

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 2

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 2

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 3
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**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 3

Date:

**Review: How Did I Do This Week?**

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**Reflect: What Can I Do Better Next Week?**

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**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

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# Monday

Date:  
Week 3

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 3

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 3**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 3

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 3

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 3

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30









Highest Paying Clients	Date: Week 4
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**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 4

Date:

**Review: How Did I Do This Week?**

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**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 4

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 4

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 4**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 4

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 4

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 4

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 4

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



Highest Paying Clients	Date: Week 5
---------------------------	-----------------

Highest Paying Client Category A: \_\_\_\_\_

Highest Paying Client Category B: \_\_\_\_\_

Highest Paying Client Category C: \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 5

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 5

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 5

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 5**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 5

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30

# Thursday

Date:

Week 5

### Daily Scorecard:

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

### Prospecting Blocks

Start:
End:
Start:
End:
Start:
End:

### Notes:

Create the thoughts that cause motivation to drive the actions that produce results.

Today's thoughts:

# Friday

Date:  
Week 5

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 5

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 5

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 6
--	-----------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 6

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 6

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 6

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 6**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 6

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 6

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 6

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 6

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



Highest Paying Clients	Date: Week 7
---------------------------	-----------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 7

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 7

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 7

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 7**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 7

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 7

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
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7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 7

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 7

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks

# Notes:

Lined area for taking notes, consisting of multiple horizontal lines.

Highest Paying Clients	Date: Week 8
---------------------------	-----------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 8

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="checkbox"/>
Category B	<input type="checkbox"/>
Category C	<input type="checkbox"/>

Notes:

--

# Monday

Date:  
Week 8

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 8

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 8**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
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8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 8

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 8

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 8

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:

Week 8

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night:

Is this Optimal?

Average Nap Time each day:

Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day:

Is this Optimal?

Average time with family on weekends:

Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 9
--	-----------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 9

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 9

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 9

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 9**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 9

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 9

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 9

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 9

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



Highest Paying Clients	Date: Week 10
---------------------------	------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 10

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="checkbox"/>
Category B	<input type="checkbox"/>
Category C	<input type="checkbox"/>

Notes:

--

# Monday

Date:  
Week 10

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 10

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 10**

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 10

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 10

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: Week 10

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 10

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



Highest Paying Clients	Date: Week 11
---------------------------	------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 11

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="checkbox"/>
Category B	<input type="checkbox"/>
Category C	<input type="checkbox"/>

Notes:

--

# Monday

Date:  
Week 11

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 11

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Wednesday**      **Date:**  
**Week 11**

**3 Biggest Goals Today**

1

2.

3

**Other Tasks**

**Appointments**

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday Date: Week 11

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 11

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: Week 11

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 11

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: _____ Week 12
--	------------------------

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 12

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 12

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 12

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 12**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 12

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 12

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 12

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks	

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday

Date:  
Week 12

Daily Scorecard:

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

Prospecting Blocks

Start:	
End:	
Start:	
End:	
Start:	
End:	

Notes:

Create the thoughts that cause motivation to drive the actions that produce results.

Today's thoughts:

Lined area for writing notes.

# Sunday

Date:  
Week 12

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks



<h1 style="margin: 0;">Highest Paying Clients</h1>	Date: <div style="text-align: right; font-weight: bold;">Week 13</div>
--	---

**Highest Paying Client Category A:** \_\_\_\_\_

**Highest Paying Client Category B:** \_\_\_\_\_

**Highest Paying Client Category C:** \_\_\_\_\_

	Highest Paying Client Category A	Highest Paying Client Category B	Highest Paying Client Category C
Direct Mail			
Phone Call			
Social Media IM			
Voicemail			
Email			

**Highest Paying Client Category A Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category B Information:**

Name:	
Email:	
Phone:	
Address:	

**Highest Paying Client Category C Information:**

Name:	
Email:	
Phone:	
Address:	

# Week 13

Date:

**Review: How Did I Do This Week?**

--

**Reflect: What Can I Do Better Next Week?**

--

**3 Biggest Goals This Week**

1
2.
3

**Weekly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

**Did I Contact My  
Highest Paying  
Client's?**

Category A	<input type="radio"/>
Category B	<input type="radio"/>
Category C	<input type="radio"/>

Notes:

--

# Monday

Date:  
Week 13

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Tuesday

Date:  
Week 13

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





**Date:**

# Wednesday

**Week 13**

<b>3 Biggest Goals Today</b>	
<b>1</b>	
<b>2.</b>	
<b>3</b>	

<b>Other Tasks</b>	

<b>Appointments</b>			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Thursday

Date:  
Week 13

## 3 Biggest Goals Today

1

2.

3

## Other Tasks

## Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Friday

Date:  
Week 13

### 3 Biggest Goals Today

1

2.

3

### Other Tasks

### Appointments

5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30



# Saturday Date: \_\_\_\_\_ Week 13

3 Biggest Goals Today	
1	
2.	
3	

Other Tasks

Appointments			
5:00	9:30	14:00	18:30
5:30	10:00	14:30	19:00
6:00	10:30	15:00	19:30
6:30	11:00	15:30	20:00
7:00	11:30	16:00	20:30
7:30	12:00	16:30	21:00
8:00	12:30	17:00	21:30
8:30	13:00	17:30	22:00
9:00	13:30	18:00	22:30





# Sunday

Date:  
Week 13

## REST:

**Am I sleeping enough? Do I need more Sleep?**

Average Amount of Sleep A Night: Is this Optimal?

Average Nap Time each day: Is this Optimal?

**What Can I do to ensure I'm getting optimal sleep each night:**

## FAMILY

**Am I taking enough time out of my week for my family?**

Average time with family each week day: Is this Optimal?

Average time with family on weekends: Is this Optimal?

**What can I do to improve family time?**

## HEALTH

**Am I eating right and exercising as I should?**

Daily eating habits:

Daily Exercise:

Poor

Fair

Poor

Fair

Good

Excelent

Good

Excelent

## Other Tasks

**\_\_ Quarter**      Date: \_\_\_\_\_

Goals This Quarter & were they accomplished?	
1.	
2.	
3.	
4.	
5.	
6.	

Review: How Did I Do This Quarter?	

Refection: What Can I Do Better Next Quarter?	

**Total Quarterly Scorecard:**

Contact Attempts	
Contacts Reached	
Appointments Scheduled	
Appointments Kept	
Contracts Signed	
Deals Closed	

Did I Contact My Highest Paying Client's?	
13 Category A	<input type="radio"/>
13 Category B	<input type="radio"/>
13 Category C	<input type="radio"/>

Notes:



# Notes:













