

 **Three (3) Activity Template Options...to help you Get Started**

Choose a template of the (customizable) Revenue-Producing Activities, that can drive your business!

1. Template for **Insurance/Financial Services (FS/OCS) Categories** (Total = 21)

Prospecting					
Days Worked	<input type="text" value="1"/>	Dials	<input type="text" value="13"/>	Reached	<input type="text" value="6"/>
Appts Set	<input type="text" value="2"/>	Appts Made	<input type="text" value="0"/>	Appts. Kept	<input type="text" value="0"/>
Referral Attempts	<input type="text" value="0"/>	Referrals Obtained	<input type="text" value="0"/>	New Seen	<input type="text" value="0"/>
Old Seen	<input type="text" value="0"/>				
Sales Activity					
Cases Open	<input type="text" value="0"/>	Qual Suspect	<input type="text" value="0"/>	Case Profiles	<input type="text" value="0"/>
Closing Int	<input type="text" value="0"/>				
Productivity/Revenue					
Buying Entities	<input type="text" value="0"/>	New Client	<input type="text" value="0"/>	Lives Submitted	<input type="text" value="0"/>
# of Inv Prods	<input type="text" value="0"/>	BGA Units Sold	<input type="text" value="0"/>	Insur (\$)	<input type="text" value="0"/>
Inv Prod (\$)	<input type="text" value="0"/>	Total (\$)	<input type="text" value="0"/>		

2. Template for **Practice Manager (PM) Categories** (Total = 21)

Prospect					
Days Worked	<input type="text" value="1"/>	Qualified Leads / Referrals	<input type="text" value="0"/>	Prospect Calls	<input type="text" value="0"/>
Contacts	<input type="text" value="0"/>	Appts Set	<input type="text" value="0"/>		
Opening Int. Sched	<input type="text" value="0"/>	Opening Int. Held	<input type="text" value="0"/>	Fact Finder	<input type="text" value="0"/>
Case Open					
New Case Open	<input type="text" value="0"/>	Closing Int. Sched	<input type="text" value="0"/>	Closing Int Held	<input type="text" value="0"/>
Total Sched.	<input type="text" value="0"/>				
Total Held	<input type="text" value="0"/>				
Client(s)					
Buying Entities	<input type="text" value="0"/>	Ins Units	<input type="text" value="0"/>	Sec Units	<input type="text" value="0"/>
# Plans	<input type="text" value="0"/>	Ins (\$)	<input type="text" value="\$0"/>	Securities (\$)	<input type="text" value="\$0"/>
Fees (\$)	<input type="text" value="\$0"/>	Total Deals	<input type="text" value="0"/>	Total (\$)	<input type="text" value="0"/>

3. Template for **General Sales/SAM 70 (GE/SAM70) Categories** (Total = 12)

Sales Activity			
Days Worked	<input type="text" value="1"/>	Calls	<input type="text" value="0"/>
Contacts	<input type="text" value="0"/>	Appts Set	<input type="text" value="0"/>
Business Building			
Open Interviews	<input type="text" value="0"/>	Closing Interviews	<input type="text" value="0"/>
Appt Kept	<input type="text" value="0"/>	Referrals Obtained	<input type="text" value="0"/>
Production			
Case(s) Open	<input type="text" value="0"/>	Buying Entities	<input type="text" value="0"/>
# Products	<input type="text" value="0"/>	Revenue (\$)	<input type="text" value="\$0"/>