

Prospect Gaming 😊

	5	1	←-Weekly Target													60	←- Points Goal/Week
Type	New Prospects	Referrals Rcvd	Cold email or linked-in	Text/ Email request appt	Phone/ FtF call request appt	Getting Prospect in-person appt	Request Referral from Client	Referral Reach Out	Referral Appt Set	Benefit Mtg with prospect	Convert follow-up call or email	Client agrees to join & proposal sent	DocuSign received	FtF 1:1 with referral partner	Speaking, network or sponsor events	Total Points	Comments
			CLM	ERA	PCA	PGA	CRR	RRO	RAS	PBM	CFU	JOIN	DOC	RFtF	NET		
Points	n/a	n/a	0.5	1	2	2	2	1	1	3	2	3	3	2	5		
Total YTD	257	23	181	145	170	50	23	106	47	46	217	36	25	32	66	2024	
23-Sep										1						3	PBM; Bas...
24-Sep	3										1				2	12	NET: Trustegritgy Power Team mtg; PRISM REIT; CFU Ste...
25-Sep																0	
26-Sep	1										1				1	7	NET: SDC w/ S.; CFU La..
27-Sep	1			2	1		1	1			4	1			1	23	NET: MSC Event; PCA Na...; CFU Hu...; Frit...; Basin...; Rys..y; JOIN Ste...; CRR La...; ERA Hav...; Pi...; RRO Kle..
Total Points	5	0	0	2	2	0	2	1	0	3	12	3	0	0	20	45	
30-Sep					4						6					20	CFU - Unde.. (CLOSE), H..., Gar.., Colli..., Basi..., Stev...; PCA - Pi..., Se..., Sch..., Nat..
1-Oct					5	1		1			1					15	PCA/PGA Nat...; RRO SO...; CFU H.. PCA Ha...; Sc..., Pi.. Gr..
2-Oct				3	2	1					3					15	PCA/PGA: Am..., CFU Cha..., Gar..., Bowk...; PCA/ERA Pi. ERA S..r, Cam...
3-Oct	1			1	1	1	1				2					11	CRR/PGA Le.. via Le..(NEW); CFU Bo..., B.; ERA Deg...; PCA C..
4-Oct																0	
Total Points	1	0	0	4	24	6	2	1	0	0	24	0	0	0	0	61	
7-Oct	2	1			1			1		1	4	1				17	PBM/JOIN: Coh...; PCA Pr..., CFU G..., Ba..., H.. Co...; RRO AFP Chris...
8-Oct				1						1	4					12	CFU - Cha..., Co, Sm..., H...; PBM Sh...; ERA Rad..
9-Oct	1				1	1				1		2	1		1	21	CFU - Hu...; PCA/PGA P...; NET Trustegritgy; PBM/JOIN/DOC Na...; JOIN Shu..
10-Oct				1	1	1		1			2					10	PCA/PGA Hol.. CFU Re..., Gar...; RRO Christi.. AFP; ERA Jabl..
11-Oct									1		1					3	RAS: Christ.. (AFP); CFU H..
Total Points	3	1	0	2	6	4	0	2	1	9	22	9	3	0	5	63	

Follow-up Example from CRM

06/28: Docusign completed! Move to client!
06/27: Called at 8AM and agreed to sign; resent docusign
06/26: Left VM, texted back will call me later, didn't
06/22: email and resent docusign
06/06: Texted, got a response that maybe July
6/03: Called, no answer, hung-up
05/30: Sent follow-u email if interested in planning
05/18: Called to see if still interested, definitely yes in next few weeks
04/29: Sent a text, no response
04/23: Called and definitely wants to proceed but tied up with a major work project; call next week
04/16: Called and left VM
04/09: Sent follow-up email summary and sent docusign
04/02: Met FtF; reviewed planning approach; seemed very interested and wanted to think about it over the week; offered \$xxx planning fee
03/20: Called and left VM with option to meet on Tuesday, Apr 2nd; agreed later
03/18: Sent text to tentatively meet on Tuesday PM
03/04: Client sick, had to cancel.
02/27: Called, VM was full, texted and offered to meet next Monday.
02/11: Spouse is sick, wants to meet, asked me to call back at the end of next week
01/19: Met at network event, would like a reach out in a couple of weeks to set meeting