

# Monday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type	/
# Calls	
# Conversations	
# Appointments Set / Held	/
# Pitches	
# Apps	
# Cross Sell Attempts	
Referrals	
Events Booked / Held	/
Monthly Premium / Yearly Premium	/

Notes

# Tuesday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type	/
# Calls	
# Conversations	
# Appointments Set / Held	/
# Pitches	
# Apps	
# Cross Sell Attempts	
Referrals	
Events Booked / Held	/
Monthly Premium / Yearly Premium	/

Notes

# Wednesday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type	/
# Calls	
# Conversations	
# Appointments Set / Held	/
# Pitches	
# Apps	
# Cross Sell Attempts	
Referrals	
Events Booked / Held	/
Monthly Premium / Yearly Premium	/

Notes

# Thursday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type

/

# Calls

# Conversations

# Appointments Set / Held

/

# Pitches

# Apps

# Cross Sell Attempts

Referrals

Events Booked / Held

/

Monthly Premium / Yearly Premium

/

## Notes

# Friday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type	/
# Calls	
# Conversations	
# Appointments Set / Held	/
# Pitches	
# Apps	
# Cross Sell Attempts	
Referrals	
Events Booked / Held	/
Monthly Premium / Yearly Premium	/

Notes

# Saturday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type	/
# Calls	
# Conversations	
# Appointments Set / Held	/
# Pitches	
# Apps	
# Cross Sell Attempts	
Referrals	
Events Booked / Held	/
Monthly Premium / Yearly Premium	/

## Notes

# Sunday Sales Activity Tracking Form

Date:

Agent:

Print this form to help you keep track of your activities each day.  
Then transfer your totals to your weekly activity report.

# Leads / Primary Type

/

# Calls

# Conversations

# Appointments Set / Held

/

# Pitches

# Apps

# Cross Sell Attempts

Referrals

Events Booked / Held

/

Monthly Premium / Yearly Premium

/

## Notes

# Weekly Sales Activity Report

Conversations Goal    Actual    Dif

Week Ending:  Agent:

	# LEADS Type	CALLS	CONV	Appts Set Appts Held	PITCH	APPS	X-Sell	Referrals	Events Booked Events Held	M-Prem Y-Prem
Monday	_____			_____					_____	_____
Tuesday	_____			_____					_____	_____
Wednesday	_____			_____					_____	_____
Thursday	_____			_____					_____	_____
Friday	_____			_____					_____	_____
Saturday	_____			_____					_____	_____
Sunday	_____			_____					_____	_____

Totals

What meetings or training activities did you attend with your sales manager this week?

What Seminars or Expos did you work this week?

What was your best sale this week, and why?

What was your most difficult sale this week and why?

What do you need to improve on to be a better salesperson?

**100 / 20 / 15**

100 sales conversations should give you 20 presentations opportunities. 20 presentations should yield 15 sales, if you have a 75% closing ratio.

**Back into your goals.    You control your own effort level.    The Law of Averages Works!**