



MONDAY

___/___/___

YOU ARE AWESOME!

Friends, Family, Co-workers

AGENT CALLS: 13 HELLOS

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

5 HANDWRITTEN NOTES

1. _____
2. _____
3. _____
4. _____
5. _____

3 FACE TO FACE MEETINGS

1. _____
2. _____
3. _____

LEADS:

APPLICATIONS:

PRE-APPROVALS:

NOTES:



TUESDAY

___/___/___

**SMOOTH & FLAWLESS
CLOSING**

Friends, Family, Co-workers

LOAN STATUS UPDATE: 13 HELLOS

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

5 HANDWRITTEN NOTES

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

3 FACE TO FACE MEETINGS

- 1. _____
- 2. _____
- 3. _____

LEADS:

APPLICATIONS:

PRE-APPROVALS:

NOTES:



WEDNESDAY

___ / ___ / ___

ASK FOR THE BUSINESS

Friends, Family, Co-workers

PAST CLIENTS/DB:13 HELLOS

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

5 HANDWRITTEN NOTES

1. _____
2. _____
3. _____
4. _____
5. _____

3 FACE TO FACE MEETINGS

1. _____
2. _____
3. _____

LEADS:

APPLICATIONS:

PRE-APPROVALS:

NOTES:



THURSDAY

___ / ___ / ___

**TOUCH THE LEAD,
TOUCH THE PARTNER**

Friends, Family, Co-workers

PALS/TBD: 13 HELLOS

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

5 HANDWRITTEN NOTES

1. _____
2. _____
3. _____
4. _____
5. _____

3 FACE TO FACE MEETINGS

1. _____
2. _____
3. _____

LEADS:

APPLICATIONS:

PRE-APPROVALS:

NOTES:



FRIDAY

___/___/___

TOTALS FOR THE WEEK

You can't manage what you
don't measure.

HELLOS:

LEADS:

HANDWRITTEN
NOTES:

APPLICATIONS:

FACE TO FACE:

PRE-APPROVAL:

NOTES:
