

Weekly Planner

Monday Morning

In Office Time:

Answer emails, administrative work, confirm appointments for the week (via email or phone), follow up on quotes presented, follow up on submissions to quote, get pictures, turn in quotes from prior week, etc.

Monday Afternoon

Phone calls to 10 prospects or visits to 5 prospects.

Must be Out of Office - Tuesday, Wednesday, Thursday

Answer emails first thing and end of day.

Out of the Office Time:

Appointments with Customers and Prospects, BNI Meetings, Referral Meetings, Events, Client Lunches, etc.

Need to connect with 5-10 people each day.

Administrative work is minimal.

Friday Morning

Follow up Phone Calls or Visits. Set Calendar for Following Week.

Sales Meetings – once a month.

Friday Afternoon

Answer emails, supplemental mailings, prepare submissions to quote from the week, follow up on quotes presented, follow up on submissions to quote, prepare reports, input data into Salesforce.com.

GOAL: Connect with 40 people a week (excluding BNI).

What Your Typical Week Should Look Like

Monday AM – Administrative Work, confirm appointments for the week, follow-up on submissions

Monday PM – Phone calls and emails to 20-25 prospects; send mailings to 10-15 prospects

Tuesday, Wednesday, Thursday – Drop-ins, initial appointments, proposal presentations, follow-ups (days on the field)

Friday AM - Follow-up phone calls and emails to 20-25 prospects; follow-up mailings to 10-15 prospects

Friday PM - Administrative Work, follow-up on submissions, other agency work

To Do List:
