

## SAMPLE ACTIVITY CATEGORIES for FS (Financial Services/OCS) TEMPLATE

Business Development															
Days Worked	0	Dials	0	Reached	0	Appts Set	0	Appts Made	0	Appts Kept	0	Referral Attempts	0	Referrals Obtained	0
New Seen	0														
Points Categories															
Openers	0	Qual Suspect	0	Fact Find	0	Case Open	0	Closing Int	0						
Sales															
Buying Entities	0	New Client	0	# of Insur Apps	0	# of Inv Prods	0	Insur (\$)	0	Inv Prod (\$)	0	Total (\$)	0		
Total Points	0														

## SAMPLE ACTIVITY CATEGORIES FOR PM (PRACTICE MANAGER) TEMPLATE

Prospecting															
Days Worked	0	Qualified Leads / Referrals	0	Prospect Calls	0	Contacts	0	Appts Set	0	Opening Int. Sched	0	Opening Int. Held	0		
Fact Finding	0														
Cases Open															
New Case Open	0	Closing Int. Scheduled	0	Closing Int Held	0	Total Sched.	0		Total Held	0					
New Client(s)															
Buying Entities	0	Ins Units	0	Sec Units	0	# Plans	0	Ins (\$)	0	Securities (\$)	0	Fees (\$)	0	Total (\$)	0
Total Deals	0														

## SAMPLE ACTIVITY CATEGORIES for ML (MULTI-LINE) TEMPLATE

Prospecting																
Days Worked	0	Qualified Leads / Referrals	0	Prospect Calls	0	Contacts	0	Appts Set	0	Appt Kept	0	Client Quotes	0			
Client Reviews	0	Fact Find	0													
Case Open (Submitted)																
Ask To Buys	0	Buying Entities	0	New Client	0	# of Life	0	# of H/DI/LTC	0	# of Auto	0	# of Home	0	# of Umbrella	0	
# of Annuity	0	# of Mutual Fund	0	# of Other	0	# Commercial Quotes	0	Total Sales	0		Life (\$)	0	H/DI/LTC (\$)	0	Auto (\$)	0
Home (\$)	0	Umbrella (\$)	0	Annuity (\$)	0	Mutual Funds (\$)	0	Other (\$)	0	Total (\$ Submitted)	0					
Clients (Paid)																
Life (\$)	0	H/DI/LTC (\$)	0	Auto (\$)	0	Home (\$)	0	Umbrella (\$)	0	Annuity (\$)	0	Mutual Fund (\$)	0	Other (\$)	0	
Total Paid (\$)	0															

## SAMPLE ACTIVITY FOR GE (GENERAL SALES) TEMPLATE

Prospect													
Days Worked	5	Qualified Leads / Referrals	5	Prospect Calls	150	Contacts	40	Appts Set	15	Appts Kept	12	Closing Int	8
Client(s)													
Buying Entities	5	# of Products Sold	4	Revenue	3500								