

Weekly Summary of Daily Activity Pipeline

Name: _____

		<i>Prospecting Pipeline</i>				<i>Production Pipeline</i>					
Personal →		Total Inventory	Cold Names	Warm Referrals	Appoint. Booked	Appoint. Scheduled	First Present.	FNA 1	FNA2	Life Closes	IBAs
	Goals										
	Actual										

		<i>Prospecting Pipeline: Team</i>				<i>Production Pipeline: Team</i>					
↓ Team Members		Total Inventory	Cold Names	Warm Referrals	Appoint. Booked	Appoint. Scheduled	First Present.	FNA 1	FNA 2	Life Closes	IBAs
	Goals										
	Actual										
	Goals										
	Actual										
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	Goals										
	Actual										
	Goals										
	Actual										
	Goals										
	Actual										
Actual Team Totals											

<u>GUESTS:</u> Opportunity Meeting → → →						<i>Invited</i>	<i>Confirm</i>	<i>Attend</i>	<i>R/S</i>
<i>Personal</i>									
<i>Team</i>									
Totals									