

WBL Builders Toolbox Tracking System

Page: 90 Day Calendar	Use and Purpose: Use this tool to track multiple facets of your business. Use the color coding system to fill in all business commitments (Fast Start Schools, Conference Call and webinars, Opp meetings, etc.) and personal commitments. Use this calendar to indicate recruiting, production, promotion and income goals. By focusing on our business as a 90 day plan we can keep a constant into the activity pipelines.
Sales Logs	Track personal and team results. The team page is organized by team leader – you will need a page for each.
Weekly Schedule	Broken into 3 sections, this calendar allows you to turn 1 day into 3. Each section is to be marked up with commitments using the color coding system. The goal is then to fill the rest up with green!
Possibility Log	Divided into 2 sections, this will allow you to track by team the possible closes and recruits for the week. The recruit log is divided into sections so that you will know exactly where the prospect is in the process. The sales log is broken down by product.
Top Ten List	These are the prospects – 10 minimum – that you MUST make today to move your business
Daily Call Log	This allows you to be able to track and note any calls that need to be made by you that day. It is an especially important part of the follow up system.
Contact Info	Give you a place to note information about a prospect as well as track conversations with them.
Color Coding	Red – conference calls, Opp, Training etc. – all the non-negotiable business events you must attend Green – Personal business activity Blue – Team business activity you are involved in Black – activity in your personal, non-Primerica life