WEEKLY KPI TRACKER

FAMILY FIRST LIFE | AN INTEGRITY COMPANY

AGENT NAME: _____

MONTH: _____

WEEKLY LEADS PURCHASED:

MONDAY

● = NO ANSWER ∅ = ANSWER NOT SCHEDULE $ = FAMILY BOOKED DATE:

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

DAILY KPI'S

/300 _____ Dials Made ☐

/10 _____ Booked Appts. ☐

/4 _____ Presentations ☐

/2 _____ Policies Submitted ☐

_____ No Shows

TUESDAY

● = NO ANSWER ∅ = ANSWER NOT SCHEDULE $ = FAMILY BOOKED DATE:

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

DAILY KPI'S

/300 _____ Dials Made ☐

/10 _____ Booked Appts. ☐

/4 _____ Presentations ☐

/2 _____ Policies Submitted ☐

_____ No Shows

WEDNESDAY

● = NO ANSWER ∅ = ANSWER NOT SCHEDULE $ = FAMILY BOOKED DATE:

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

		APPTS:	
20	○○○○○○○○○○○○○○○○○○○○	_____	START TIME: _____
40	○○○○○○○○○○○○○○○○○○○○	_____	END TIME: _____
60	○○○○○○○○○○○○○○○○○○○○	_____	HOURS WORKED: _____
80	○○○○○○○○○○○○○○○○○○○○	_____	LEAD TYPE: _____
100	○○○○○○○○○○○○○○○○○○○○	_____	TOTAL DIALS: _____
			TOTAL BOOKED: _____

DAILY KPI'S

/300 _____ Dials Made ☐

/10 _____ Booked Appts. ☐

/4 _____ Presentations ☐

/2 _____ Policies Submitted ☐

_____ No Shows

FAMILY FIRST LIFE | AN INTEGRITY COMPANY

"THE FEARS WE DON'T FACE BECOME OUR LIMITS."

● = NO ANSWER ø = ANSWER NOT SCHEDULE $ = FAMILY BOOKED

DATE:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

THURSDAY

DAILY KPI'S

/300
Dials Made

/10
Booked Appts.

/4
Presentations

/2
Policies Submitted

No Shows

● = NO ANSWER ø = ANSWER NOT SCHEDULE $ = FAMILY BOOKED

DATE:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

FRIDAY

DAILY KPI'S

/300
Dials Made

/10
Booked Appts.

/4
Presentations

/2
Policies Submitted

No Shows

● = NO ANSWER ø = ANSWER NOT SCHEDULE $ = FAMILY BOOKED

DATE:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

	APPTS:	
20		START TIME:
40		END TIME:
60		HOURS WORKED:
80		LEAD TYPE:
100		TOTAL DIALS:
		TOTAL BOOKED:

SATURDAY

DAILY KPI'S

/300
Dials Made

/10
Booked Appts.

/4
Presentations

/2
Policies Submitted

No Shows

Weekly Summary: