NIGHTLY DEBRIEF

"Where attention goes, energy flows, and results always show."

Today's Mission:

1. _____
2. _____
3. _____

Outcome:

- Doors Knocked (Sales Rabbit): _____
- Contact Made (Conversations): _____
- Inspections (Pictures taken and uploaded): _____
- Appointments Set (Sales Call): _____
- Claims Submitted (Service Agreement): _____
- Pre-Builds Insurance (Approved and appt. set to sign contract and collect deposit): _____
- Builds (Build date set): _____
- Retail Sales (Signed Contracts): _____
- Contract Amount: Insurance claims + retail sales (Total $ amount of contracts for the day): _____
- Collected Amount: _____
- Google Reviews: _____
- New Customer Name/Source
    - Customer #1: _____
    - Customer #2: _____
    - Customer #3: _____

Victories:

1. _____
2. _____

Challenges:

1. _____
2. _____

Saturdays:

1. Every Saturday, sales reps spend one hour on the phone making follow-up calls.
    a. One communication per week must be entered into AccuLynx.
    b. 2nd follow-up reminder entered into calendar for the following Tuesday
    c. 3rd follow-up reminder entered into calendar for the following Thursday
    d. If no contact is made, sales reps will drive to the prospective customer's home and leave a legible note. (Create a form letter for the team)