

Week 2 Checklist: _____

FTA: _____

FSL: _____

MAIN OBJECTIVE: Appointment Setting

1. Shown Macro Recorder / Understands How to Use It: _____
2. Set Up w./ LeadsMall: _____
3. Pulling DreamTeam Leads Daily: _____
4. Trained on Navigating Google Calendar: _____
5. Understands Appointment Protocol: _____
6. Received and Reviewed Pitch Script: _____
7. Received and Downloaded UW Guides: _____
8. Daily Actions Minimum:
 - a. Dials: _____
 - b. Texts: _____
9. Pipeline Sheet: _____
10. Applied for TN License: _____
11. Following Up 2x/ Day : _____
12. Understands New Text Timeline: _____
13. Understands New Disposition Tags: _____
14. Creating Weekly Schedule: _____
15. How to Work Leads in Order of Priority:
 - a. _____
 - b. _____
 - c. _____