

Date:
Your Name:

	First	Last	Phone	State, City	*Last Call	*Next Call	S = Small Biz Plan G = Group F=Family	# of employees	Video / Website	B2B Webinar	B2B Briefing	B2B Luncheon	Field Trainer Assist	Phone Overview	Decision Maker Meet	Enrollment	Member	Associate	Notes	In Follow up box
eg	Jane	Doe	212.222.2222	CT,Windsor	8/10	8/14				6/15			6/15				6/18		(sister) did sitdown Wednesday, got membership / keep informed about business	
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Business Goals:

Field Trainers:

***USE PENCIL!**

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Note: Put a star next to your top 10 prospects.

S = Potential Small Business Member, G=Potential Employee Benefit Group, F = Potential Individual or Family Plan member

v09162016