

Goal Setting and Tracking Form

Week of:

Task	Goal	Actual	Notes
Agent contacts...			
Phone call to agents			
In person visits			
Activities, meetings or lunches			
Letters sent			
Borrower contacts...			
Prospects (inquiry or prequal)			
Submitted to processing			
Closings			
Borrower mailings			
Business cards given out			
Time Management...			
Weekly hourly goal for marketing			
Weekly goal for education			

12 month Unit goal
 12 month Income goal

Goals for this week -

1		4
2		5
3		6