

ACCOUNTABILITY MEETING — PERFORMANCE AND PROJECTION (P&P)

Send this form to your Accountability Partner and Manager 24 hours before your Accountability Meeting, which is on: _____ at: _____

Name: _____ Week: 1 2 3 4 5 Manager Review Date: _____

Please reference your DWS and HPAG reports for details

Income Income is your weekly need — Making sales is how you earn it!

Yearly Financial Needs: _____ Monthly Financial Needs: _____

Year to Date Earned: _____ Month to Date Earned: _____

Year to Date Paid: _____ Month to Date Paid: _____

My Performance for the Week

Sales	Notes	Rentals	Notes	Referrals — COI	Notes
Paid: _____		Paid: _____		Referrals: _____	
Actual: _____		Actual: _____		Actual: _____	
Offers: _____		Offers: _____		COI Meetings: _____	
Actual: _____		Actual: _____		Actual: _____	
Presentations: _____		Presentations: _____		Based on my performance this week, should I be hired back next week? Y/N	
Actual: _____		Actual: _____			
Offers: _____		Offers: _____			
Actual: _____		Actual: _____			

My Top Three Needs for the Week:	Achieved (Yes/No)	I did not achieve the needs(s) because:
1) _____		
2) _____		
3) _____		

I Made the Following Sales Presentation this Past Week

Monday: _____

Tuesday: _____

Wednesday: _____

Thursday: _____

Friday: _____

Saturday: _____

Sunday: _____

Please note how you would rate your performance for the past week and explain: _____

Sales/Rental Contracts Completed This Week

Client	Building/Unit	Type	Commission to Me
Total:			

Wins for This Week

My #1 WIN for the week: _____

Wins: _____ Benefits: _____

Losses for This Week

Losses: _____ To Improve: _____

My Income Need for the week was: _____ I achieved: _____

What Went Right: _____

What Went Wrong: _____

I completed: _____ presentations this week... ...that resulted in: _____ agreements

My Closing Rate is 1 out of _____

I received _____ new referrals this week from the following clients: _____

My #1 mental breakthrough this week for making more sales: _____

of Morning Check-Ins with Accountability Partner: _____ # of Evening Check-Ins with Accountability Partner: _____

My Projections for Next Week

My Needs for next week are:

1. Income: _____ **Presentations:** _____ **Calls:** _____ **COI Meetings:** _____ **Accountability Meetings:** _____

My Top 3 Need for Next Week Are:

Actions to Take: _____

#2 _____

Actions to Take: _____

#3 _____

Actions to Take: _____

Sales and Rental Contracts Pending

Client	BLDG/Unit	Type	Commission to Me
		Total:	

Send this form to your Accountability Partner and Manager 24 hours before your Accountability Meeting which is: _____ at: _____

My Signature: _____

Date: _____

Accountability Partner's Signature: _____

Date: _____

Manager's Signature: _____

Date: _____