



# Today, Did You...

Week of: \_\_\_\_\_

Category	Opportunity	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<b>SALES:</b>	Open a New Account							
	Cross Sell a Product (non-loan)							
	Cross Sell a Loan							
	Cross Sell a Service							
	Make a Mortgage Referral							
	Make an Investment Referral							
	Make a Loan Referral							
	Write 5 Handwritten Cards							
	Phone a New Client							
	Thank 5 Clients for their Business							
	Ask 5 Clients to Refer a Friend							
OTHER:								
<b>RETAILER RELATIONS:</b>	Meet A New Retail Associate							
	Interact with 5 or more Associates							
	Meet A New Department Head							
	Interact with a Department Head							
	Interact with the Store Manager							
	Interact with a Co-Manager							
	Distribute Pens to Cashiers							
	Visit the Retail Break Room							
	Post Materials in Retail Break Room, if allowed							
	Attend New Hire Orientation, if allowed							
	Attend Retail Employee Meeting							
	Interact with Personnel Department							
	Deliver a 15 minute Seminar to Associates							
	Put Away A Grocery Cart							
Return Misplaced Store Product								
Park in Retail Employee Lot/Area								
OTHER:								
<b>BUSINESS DEVELOPMENT:</b>	Complete 30 Minutes Total							
	See You Out Front Time							
	Bag Groceries							
	Greet at Front Door							
	Conduct Aisle Time							
	Approach a Business							
	Meet Someone New							
	Build Upon a Current Relationship							
	Help a Shopper Locate Store Product							
	Conduct a Branch Activity							
	Invite 5 Shoppers to Enter Drawing							
OTHER:								
<b>PROFESSIONAL DEVELOPMENT:</b>	Learn a New Skill:							
	Shadow a Colleague							
	Mentor a Colleague							
	Attend a Training Class							
	Listen to FSI Podcast							
	Read a Business Book							
	Complete FSI Online In-Store Sales Training							
	Attend one-on-one Coaching Session							
	Attend a Team Coaching Session							
Conduct Daily Huddle/Staff Meeting								
<b>PAs (if allowed):</b>	Deliver 5 PAs							
	Log All 5 PAs							
	Write a New PA							