



DAILY ACTIVITY TRACKER

Track the actions that build skill, consistency, and client service

Track the actions you control. Review the numbers at the end of each day and adjust tomorrow's plan.

Date: _____	Primary Goal: _____
Start Time: _____	End Time: _____

Activity Scorecard

Metric	Goal	Actual
Outbound calls / dials	_____	_____
Texts / emails	_____	_____
Live conversations	_____	_____
Appointments set	_____	_____
Appointments completed	_____	_____
Quotes presented	_____	_____
Applications submitted	_____	_____
Annual premium (AP)	_____	_____
Follow-ups completed	_____	_____
Client service touches	_____	_____
Recruiting conversations	_____	_____
Training / role-play minutes	_____	_____

Call Blocks

Time Block	Focus	Notes
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Time Block	Focus	Notes
_____	_____	_____
_____	_____	_____

End-of-Day Review

- I completed my highest-priority call block.
- I followed up with every scheduled prospect/client.
- I documented pending cases and next actions.
- I completed at least one training or role-play activity.
- I know my top 3 priorities for tomorrow.

What worked today? _____

What will I improve tomorrow? _____