



# DAILY CHECKLIST

MONTH, DAY

- Update the Trend and Production Board
- Update Campaign Log/Sheet
- Territory (Assistant Manager helping? Follow-up & inspect!)

## Check Reports

### Work Habits

- Auto bill pay %
- Time in field
- Credit band
- Out of tolerance (skim for red flags)

### LOA Report (2 hours after showtime, a few times during the day, hour before last knock)

- Look for things that may stand out and call reps for coaching

### Rep Daily Breakdown

- Timed loops
- Zeroes
- 1st/Last knock
- Notes

### Owner Console

- Make sure all orders are on there
- Delegated? Follow-up & inspect!
- Print as cover sheet for mailing apps
- Check splits

### Check Not Eligible for Pay

## “ | ANNOUNCEMENTS

## Plan Daily 1 on 1s | →

(\*pull from RDB and LOA)

### CRITICAL CONVERSATIONS

### PROPS FOR PEOPLE

## Who's Taking 2nds? | →

## Leader's Meeting | →

- Go over future leaders
- Meeting topic(s)?

## Morning Meeting | →

- Who's running it?
- Meeting topic(s)?
- High-Roller Speeches

## Check "ONBOARDING CHECKLIST" for all new hires | 📄

## Other Tasks to Assign | →

(Follow-up & inspect!)

- Team days into Salesforce
- Collect and file apps
- Enter splits
- Assign iPads

## Shepherding

## Check Rankings

KEY | 📄 = SEE ANOTHER DOCUMENT | → = CHART OR AREA TO BE FILLED OUT

## 📝 | NOTES