

Princeton Scorecard

Name: _____

Week of: _____

*Note: Weeks start Friday at 5:00

"We become what we do repeatedly. Excellence, therefore, is not an act. It is a habit."

Daily Practices & Weekly Practices

Write out your gratitudes

Days

Prospect and update database (2-hours / Day)

*50 Live Conversations / Week, in-person or on phone. Use F.O.R.D.

Conversations

FORD Convo w/Realtors10

FORD Convo w/Potential Borrowers5

FORD Convo w Recruits0

Actual

Goal20

Score0%

Market: Social Media and Thank You Notes (1-hour / day)

Post: Post daily

Engage: DM, Like, Comment 10 / Day

Write: 2 Notecards Per Day

Customer Service - Loans in Process (1-hour)

Update All Parties per Transaction per Week

Attend 2 Sales Trainings and Kick-Off Meeting

Number Attended:

1 on 1's completed (4)

Number Attended:

Mail Small Gift or Books to Realtors

Number Sent: 0

4x4 Requests to Potential Referral Partners (5 / Week)

MLO + Realtor ZOOM LUNCH CALLS (2)

Number Hosted: 0

Total Score

#DIV/0!

Possible Points

5

20

5

10

10

10

5

100

Your Points

0

0

#DIV/0!

0

0

0

#DIV/0!

Convos	Realtors	Date	Notes	Cards	Name	Date	NOTES
1				1			
2				2			
3				3			
4				4			
5				5			
6				6			
7				7			
8				8			
9				9			
10				10			
11				4x4's - COLD REALTOR REFERRA PARTNERS		Mail Small Gift or Book (5)	
12							
13							
14							
15							
NEW POTENTIAL BORROWERS							
1			Nawaf				
2				#	Realtor ZOOM FACETIME Meetings	#	PIPELINE REVIEW
3				1		1	Date
4				2		2	
5				3		3	
				4		4	
				5		5	
	Dave Jackson			Date	MLO ZOOM - THURSDAY LUNCH MEETING	6	
1						7	
2						8	
3						9	
4						10	
5						11	
				Date	Realtor ZOOM- COVID Updates Call	12	
						13	
						14	
						15	
						16	
						17	
						18	
						19	
						20	
						21	
						22	
						23	
						24	
						25	
	I'm so grateful today for ...					26	
Friday						27	
Saturday						28	
Sunday						29	
Monday						30	
Tuesday						31	
Wednesday						32	
Thursday						33	
						34	
						35	
						36	
						37	
						38	
						39	
						40	
						41	
						42	
						43	
						44	
						45	

The Perfect Princeton Week

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7:00	Exercise	Exercise	Exercise	Exercise	Exercise		
8:00	Get ready for the day	Get ready for the day	Get ready for the day	Get ready for the day	Get ready for the day		
8:45	Write gratitudes / affirmations and two personal notes.	Write gratitudes / affirmations and two personal notes.	Write gratitudes / affirmations and two personal notes.	Write gratitudes / affirmations and two personal notes.	Write gratitudes / affirmations and two personal notes.		
9:00 to 10:00	Attend Sales Weekly Kick-Off Call	Post and engage on social media	Attend Sales Training	Attend Sales Training	Pick open houses and contact Realtors.		
	Post and engage on social media	Attend a Real Estate Office Sales Meeting and Present something of value			Prospect and Update Database: Make 13 FORD calls, listen for change. Look for ways to add value.		
10:00 to 11:30	Prospect and Update Database: Make 13 FORD calls, listen for change. Look for ways to add value.		Prospect and Update Database: Make 13 FORD calls, listen for change. Look for ways to add value.	Prospect and Update Database: Make 13 FORD calls, listen for change. Look for ways to add value.	Paperwork cleanup from weekend and connect with processor.		
	Review pipeline and update in-process borrowers / partners. Call, DON'T text or email.			Review pipeline and update in-process borrowers / partners. Call, DON'T text or email.	Review pipeline and update in-process borrowers / partners. Call, DON'T text or email.		
12:30 to 1:00	Lunch	Lunch with a Realtor	Lunch - Post and engage on social media	Lunch with a Realtor	Lunch - Post and engage on social media		
1:00 to 2:00	Paperwork cleanup from weekend and connect with processor.						Visit / Host Open Houses
2:00 to 3:00		Attend Broker Open Houses		Call and schedule 2 lunches for next week.	Weekly Meeting with Yourself. Review Goals and Submit Scorecard		
3:00							
4:00							
5:00							
6:00			Attend Community Event				
7:00							
8:00	BE HOME or Hang Out	BE HOME or Hang Out	BE HOME or Hang Out	BE HOME or Hang Out	BE HOME or Hang Out		