

## GREEN SHEET SALES DASHBOARD

Relationship Manager:

Month:

Date Submitted:

### Activity

#### Visits (Personal)

#### Asks (Present the Opportunity)

Number of Top 33 Visits:

Number of Asks: (Re: # of Visits)

Number of Total Visits:

Dollar Amount: (Requested / On the "Table")

*Just Visit.... Just Ask!!*

#### Other Metrics

Number of Leadership Circle: (Invited to Join)

Number of Legacy Requests: (Made)

### Productivity

#### Results

Number of Commitments:

Number Declined:

Numbers/Dollars Pending: (Legitimate Follow-up)

Dollars Committed:\*

#### Other Metrics

Number of New Leadership Circle Members:

Number of New Legacy Society Members:

Value of Planned Gifts:

\*Note: Measure increase in giving per prospect.  
(E.g., \$1,000 to \$10,000; \$10,000 to \$100,000)