

Relationship Manager:
 Month:
 Date Submitted:

THE GREEN SHEET THE SALES DASHBOARD

\$UCCESS = THINK BIGGER!

\$UCCESS = The number of times we **Share the Story** and **Present The Opportunity**

\$UCCESS = ACTIVITY & PRODUCTIVITY

\$UCCESS = Number of VISITS (with Qualified Prospects) + Number of 'ASKS'

\$UCCESS = RESULTS = GIFTS (MONEY to FUND the VISION.)

\$UCCESS = RETURN ON INVESTMENT + RETURN ON ENERGY + RETURN ON RELATIONSHIPS

THIS MONTH

ACTIVITY			
VISITS (PERSONAL)		ASKS (Present The Opportunity)	
# of Top 33 Visits		# of Asks (Re: # of Visits)	
# of Total Visits		\$ Amount (Requested/ On The 'Table')	
		# of Leadership Circle (Invited to Join)	
		# of Legacy Requests	

MAXIMIZE THE RELATIONSHIP... AT THIS GIVEN MOMENT!

TRUST THE ENGAGEMENT TOOL.

JUST ASK!!!

PRODUCTIVITY/RESULTS	
# of Commitments	
\$ Committed Note: Measure increase in giving per prospect . <i>E.g.</i> , \$1,000 to \$10,000; \$10,000 to \$100,000.	
# New Leadership Circle	
# New Legacy Society	
\$ Value Of Planned Gifts	
#/\$ Pending (Legitimate Follow Up)	
# Declined	