

GREEN SHEET MONTHLY FEEDBACK

“YOU GET WHAT YOU MEASURE”

\$UCCE\$\$ = # of times we SHARE THE STORY & PRESENT THE OPPORTUNITY.

\$UCCE\$\$ = Both ACTIVITY and PRODUCTIVITY.

\$UCCE\$\$ = # of VISITS (with Qualified Prospects) & # of ASKS.

\$UCCE\$\$ = RESULTS/GIFTS/MONEY... to FUND THE VISION.

\$UCCE\$\$ = ROR & ROI & ROE
(Return-on-Relationships & Return-on-Investment & Return-on-Energy)

JUNE 2009

ACTIVITY				PRODUCTIVITY	
VISITS (PERSONAL)		ASKS (PRESENT THE OPPORTUNITY)		RESULTS	
# of Top 25 Visits		# of Asks (Re: # of Visits)		# of Commitments	
# of Total Visits		\$ Amount (Requested/ “On the Table”)		\$ Committed (Commitments to Gold & Green)	
		# of Leadership Society Asks (Invited to Join)		# Leadership Society (New Members)	
		# of Legacy Society Asks (Invited to Join)		# Legacy Society (New Members)	
“TRUST THE PRESENTATION”				\$ Value of Planned Gifts	
				#/\$ Pending (Legitimate Follow-Up)	
				# Declined	

OWNERSHIP ACCOUNTABILITY MEASUREMENT

QUARTER 2 PROGRESS

(April/May/June)

	THIS MONTH	CUMULATIVE	Q1 GOAL
# TOP 25 VISITS			
# OF TOTAL VISITS			
# OF COMMITMENTS			
\$ COMMITTED (GOLD & GREEN)			
\$ VALUE (PLANNED GIFTS)			
# NEW LEADERSHIP SOCIETY			
# NEW LEGACY SOCIETY			

SUMMARY: (ALL PRODUCTIVITY/RESULTS for the Month, including Previous Pending)

RELATIONSHIP	\$ COMMITMENT	LEADERSHIP/LEGACY MEMBERSHIP

Please attach **SUMMARY** of the Month and **CALL REPORTS**. (Relationship Name, \$ Amount on the Table or Committed, etc.)