For Impact®

GREEN SHEET
SALES DASHBOARD

Relationship Manager:

Month:

Date Submitted:

Activity

Visits *(Personal)*

Number of Top 33 Visits:	
Number of Total Visits:	

Asks *(Present the Opportunity)*

Number of Asks: (Re: # of 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)	

**Note for Sales Managers: Use this Green Sheet + Call Memos + MPL for accountability and coaching.*

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; $10,0000 to $100,000)*