HARVARD™ RISK MANAGEMENT CORPORATION

DAILY ACTIVITY REPORT

Use this report to tally your daily activity points and then complete the online activity report at the end of each week. You can't improve what you can't measure. When performance is measured, performance improves. When performance is measured and reported back, the rate of improvement accelerates.

Activity	Point Values	Mon		Tues		Wed		Thurs		Fri		Sat		Sun		Weekly Totals
My Activity Points Goal:																
Number of New Companies Contacted by Phone:	**0.1**	Calls	Points	Calls	Points	Calls	Points	Calls	Points	Calls	Points	Calls	Points	Calls	Points	
Number of New Companies Contacted in Person:	**1**															
Number of Decision Maker Meetings:	**2**	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	
Number of Individual Membership Presentations:	**1**															
Number of Group Enrolments:	**3**	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	Mtgs	Points	
Listened to a Training Call:	**3**															
Total Daily Points:																

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Daily Activity Report Instructions

The activities listed on the report are assigned a point value. Also, decide how many activity points you want for each day and week. Also decide on what specific activities you will do to meet your activity points goal e.g., 100 calls a day 4 days a week or go see 15 new companies a day, 3 days a week. You can use the samples below as a guide. One sample shows a focus of calling on companies in person and one shows a focus of setting appointments over the telephone On average, it takes about 50-60 activity points a week to earn a six figure income with HRMC. You can follow these five steps when using this report:

1. Record your daily/weekly activity point goal at the top of the report.
2. At the end of each day record your daily activity points and then a total for that day.
3. At the end of each week total your weekly activity points for each activity category to the far right column.
4. Submit your weekly totals online at www.harvardbenefits.com under the Submit Weekly Activity Report link.
5. At the end of each month review your weekly points and results to assure that you are not only achieving your activity goal, but also your production and income goals. Adjust your activity points as needed to meet your goals.

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Daily Activity Report

Sample Setting Appointments In Person

Activity	Point Values	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Weekly Totals
My Activity Points Goal:		10	15	15	15	10	–	–	65
Number of New Companies Contacted by Phone:	0.1	Calls – Points –	Calls – Points –	Calls – Points –	Calls – Points –	Calls – Points –	Calls – Points –	Calls – Points –	–
Number of New Companies Contacted in Person:	1	–	15	15	15	–	–	–	45
Number of Decision Maker Meetings:	2	Mtgs – Points –	Mtgs 1 Points 2	Mtgs 1 Points 2	Mtgs 1 Points 2	Mtgs – Points –	Mtgs – Points –	Mtgs – Points –	6
Number of Individual Membership Presentations:	1	1	1	1	1	1	–	–	5
Number of Group Enrolments:	3	Mtgs 1 Points 3	Mtgs – Points –	Mtgs – Points –	Mtgs 1 Points 3	Mtgs – Points –	Mtgs – Points –	Mtgs – Points –	6
Listened to a Training Call:	3	3	–	–	3	–	–	–	6
Total Daily Points:		7	18	18	24	1	–	–	68

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Daily Activity Report

Sample Setting Appointments by Phone

Activity	Point Values	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Weekly Totals
My Activity Points Goal:		3	15	15	15	15	–	–	63
Number of New Companies Contacted by Phone:	0.1	Calls – Points –	Calls 100 Points 10	Calls 100 Points 10	Calls 100 Points 10	Calls 100 Points 10	Calls – Points –	Calls – Points –	40
Number of New Companies Contacted in Person:	1	–	–	–	–	–	–	–	–
Number of Decision Maker Meetings:	2	Mtgs – Points –	Mtgs 1 Points 2	Mtgs 1 Points 2	Mtgs 1 Points 2	Mtgs – Points –	Mtgs – Points –	Mtgs – Points –	6
Number of Individual Membership Presentations:	1	1	1	1	1	1	–	–	5
Number of Group Enrolments:	3	Mtgs – Points –	Mtgs – Points –	Mtgs 1 Points 3	Mtgs – Points –	Mtgs 1 Points 3	Mtgs – Points –	Mtgs – Points –	6
Listened to a Training Call:	3	3	–	–	3	–	–	–	6
Total Daily Points:		4	13	16	16	14	–	–	63

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