

CEO REPORT CARD

FOR ALL SALES AGENTS:		NOT AT ALL	SOMEWHAT	INSTALLED
1	TEAM VISION IS INSPIRING PERFORMANCE	1 2 3	4 5 6 7 8	9 10
2	TEAM BUSINESS PLAN IS COMPLETED AND SHARED	1 2 3	4 5 6 7 8	9 10
3	TEAM LEADERS HELP TEAM MEMBERS ACHIEVE THEIR GOALS	1 2 3	4 5 6 7 8	9 10
4	SHORT TERM & MONTHLY GOALS DEFINED, WRITTEN, SHARED, AGREED UPON	1 2 3	4 5 6 7 8	9 10
5	MUTUAL EXPECTATIONS DEFINED, WRITTEN, SHARED, AGREED UPON	1 2 3	4 5 6 7 8	9 10
6	MONTH/YEAR RECRUITING GOALS & PLAN DEFINED & WRITTEN	1 2 3	4 5 6 7 8	9 10
7	ANNUAL TRAINING OBJECTIVES DEFINED & WRITTEN	1 2 3	4 5 6 7 8	9 10
8	TRAINING CALENDAR ESTABLISHED	1 2 3	4 5 6 7 8	9 10
9	TRAINING PROGRAMS DESIGNED & WRITTEN	1 2 3	4 5 6 7 8	9 10
10	ALL TEAM MEMBERS UNDERSTAND & EXECUTE SALES PROCESS	1 2 3	4 5 6 7 8	9 10
11	MARKETING ACTIVITY DEFINED, MEASURED & WRITTEN	1 2 3	4 5 6 7 8	9 10
12	MASTER MARKETING ACTION PLAN WRITTEN & EXECUTED	1 2 3	4 5 6 7 8	9 10
13	BI-ANNUAL + MONTHLY 1/1 PERFORMANCE COACHING PROCESS IN PLACE	1 2 3	4 5 6 7 8	9 10
14	MONTHLY TEAM MEETINGS: BRAINSTORM, DECIDE, ACTION PLAN	1 2 3	4 5 6 7 8	9 10
15	INDIVIDUAL RECOGNITION & MOTIVATION: ACTION PLAN IN PLACE	1 2 3	4 5 6 7 8	9 10
16	PROBLEM SOLVING, OUTCOME FRAMING PROCESSES USED	1 2 3	4 5 6 7 8	9 10
17	VISUAL PRODUCTION TRACKING IN PLACE	1 2 3	4 5 6 7 8	9 10
18	FINANCIAL BUDGET OPERATING SYSTEM IN PLACE	1 2 3	4 5 6 7 8	9 10
19	SYSTEMS & CHECKLIST REVIEW PROCESS IN PLACE	1 2 3	4 5 6 7 8	9 10
20	CLIENT FEEDBACK PROCESS IN PLACE	1 2 3	4 5 6 7 8	9 10