

Today's Date: \_\_\_\_\_

<b>Goal</b>		<b>Monthly Pace</b>	
<b>Working Days</b>		<b>Days Elapsed</b>	
<b>Goal Per Day</b>		<b>Per Day Actual</b>	
<b>Target to Date</b>		<b>Good Business To Date</b>	
<b>Balance MTD</b>		<b>Projected Balance</b>	
		<b>NSLI</b>	

<b>Gross Sales</b>		<b>Pending</b>	
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<b>Target Leads Issued/Day</b>		<b>Actual Leads Issued/Day</b>	
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	<b>MONTHLY GOAL</b>	<b>MTD GOAL</b>	<b>MTD ACTUAL</b>
<b>Leads</b>			

**CHEAT SHEET:**

Today's Date	Date of the actual meeting
Goal	Get this from Brad Codman.
Working Days	How many working days there are in this month. Hint: The only day that is not a working day is Sunday. We only take off major holidays, such as New Year's, Memorial Day, July 4th, Labor Day, Thanksgiving (and Friday after Thanksgiving), Christmas Eve and Christmas. Most months contain 25-27 working days.
Goal Per Day	<b>Goal / Working Days</b>
Target to Date	<b>Goal per Day X (times) Days Elapsed.</b> This is a measure of where you should be now, taking in consideration the number of days having already elapsed during the current working month.
Balance MTD	<b>Target to Date - (minus) Good Business To Date.</b> This is a measure of where you are now, compared to where you should be. It can either be a positive or negative number.
Monthly Pace	<b>Per Day Actual X (times) Working Days.</b> This is a measure of the Good Business that you are projecting, based upon your current performance.
Days Elapsed	The number of working days that have elapsed so far this month, NOT counting today (the date of the actual meeting).
Per Day Actual	<b>Good Business to Date / (divided by) Days Elapsed.</b> This is the amount of Good Business you are averaging per day so far.
Good Business To Date	Total Good Business so far this month. Get this from the "Appointment Results" report in Salesforce.
NSLI	Get this from the "Marketing Manager's NSLI" report in Salesforce.
Projected Balance	<b>Goal - (minus) Monthly Pace.</b> This can be either a positive or a negative number and helps you see how far above or below your monthly goal you are projecting to be, based upon your current performance.
Gross Sales	Get this from the "Appointment Results" report in Salesforce.
Pending	Get this from the "Appointment Results" report in Salesforce.
Target Leads Issued/Day	<b>(Goal / (divided by) NSLI) / (divided by) Working Days.</b>
Actual Leads Issued/Day	Issued Leads so far this month / (divided by) <b>Days Elapsed.</b> Get Issued Leads from the "Appointment Results" report in Salesforce.
Leads - Monthly Goal	<b>Goal / (divided by) NSLI.</b>
Leads - MTD Goal	<b>Target Leads Issued/Day X (times) Elapsed Days</b>
Leads - MTD Actual	Month-to-date Issued Leads. Get this from the "Appointment Results" report in Salesforce.