Agent: _____

Date Leads Given: _____

Appointment Performance Tracking

Date	Client Name	Closed	DNC	No Show	Postpone	Cancel	Notes

Closed - This means you picked up a check, indicate the total Annual Premium and # of Applications in the notes
DNC - Means you did not close the appointment. Be sure to note why in the notes
No Show - While this rarely occurs, you need to know why
Postponed - You will have a few of these, but the closer your appointment to the booking date, the less likely to occur
Cancelled - Client indicated that he is no longer interested

NOTE : If you wish to receive leads the following week, this form must be completed and faxed back by Wed at midnight.