

## Appendix A

### 80-20 Prospect Sheet

Prospect	Products/Services	Demographics



## Appendix A

### 80-20 Prospect Sheet

Prospect	Products/Services	Demographics
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**Appendix A**

# 80-20 Prospect Sheet

Prospect

Products/Services

Demographics




## Appendix B

### Customer Service Follow-Up Sheet

Name of Customer: \_\_\_\_\_

Date Served: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Served: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Served: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## Appendix B

### Customer Service Follow-Up Sheet

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name of Customer: \_\_\_\_\_

Date Serviced: \_\_\_\_\_

Description: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Response: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Appendix C

### Customer Call Follow-Up Sheet

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

## Appendix C

### Customer Call Follow-Up Sheet

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Required: \_\_\_\_\_

\_\_\_\_\_

Description of Conversation: \_\_\_\_\_

\_\_\_\_\_

Date of follow-up call: \_\_\_\_\_

Next contact date: \_\_\_\_\_

## Appendix D

### Daily Time Analysis Sheet

Use this time analysis sheet for one week to track how your time is spent, then make changes as you see fit to make the most productive use of your time.

Time	Activity
5:00 A.M.	_____
5:30 A.M.	_____
6:00 A.M.	_____
6:30 A.M.	_____
7:00 A.M.	_____
7:30 A.M.	_____
8:00 A.M.	_____
8:30 A.M.	_____
9:00 A.M.	_____
9:30 A.M.	_____
10:00 A.M.	_____
10:30 A.M.	_____
11:00 A.M.	_____
11:30 A.M.	_____
Noon	_____
12:30 P.M.	_____
1:00 P.M.	_____
1:30 P.M.	_____
2:00 P.M.	_____

Time	Activity
2:30 P.M.	_____
3:00 P.M.	_____
3:30 P.M.	_____
4:00 P.M.	_____
4:30 P.M.	_____
5:00 P.M.	_____
5:30 P.M.	_____
6:00 P.M.	_____
6:30 P.M.	_____
7:00 P.M.	_____
7:30 P.M.	_____
8:00 P.M.	_____
8:30 P.M.	_____
9:00 P.M.	_____
9:30 P.M.	_____
10:00 P.M.	_____
10:30 P.M.	_____
11:00 P.M.	_____

**Number of Hours Spent:**

Work: \_\_\_\_\_

Meals: \_\_\_\_\_

Phone: \_\_\_\_\_

Quality Time with

Internet: \_\_\_\_\_

Family Members: \_\_\_\_\_

Meetings: \_\_\_\_\_

Personal Time: \_\_\_\_\_

Customer Contact: \_\_\_\_\_



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Use this time analysis sheet for one week to track how your time is spent, then make changes as you see fit to make the most productive use of your time.

Time	Activity
5:00 A.M.	_____
5:30 A.M.	_____
6:00 A.M.	_____
6:30 A.M.	_____
7:00 A.M.	_____
7:30 A.M.	_____
8:00 A.M.	_____
8:30 A.M.	_____
9:00 A.M.	_____
9:30 A.M.	_____
10:00 A.M.	_____
10:30 A.M.	_____
11:00 A.M.	_____
11:30 A.M.	_____
Noon	_____
12:30 P.M.	_____
1:00 P.M.	_____
1:30 P.M.	_____
2:00 P.M.	_____

Time	Activity
2:30 P.M.	_____
3:00 P.M.	_____
3:30 P.M.	_____
4:00 P.M.	_____
4:30 P.M.	_____
5:00 P.M.	_____
5:30 P.M.	_____
6:00 P.M.	_____
6:30 P.M.	_____
7:00 P.M.	_____
7:30 P.M.	_____
8:00 P.M.	_____
8:30 P.M.	_____
9:00 P.M.	_____
9:30 P.M.	_____
10:00 P.M.	_____
10:30 P.M.	_____
11:00 P.M.	_____

**Number of Hours Spent:**

Work: \_\_\_\_\_

Meals: \_\_\_\_\_

Phone: \_\_\_\_\_

Quality Time with

Internet: \_\_\_\_\_

Family Members: \_\_\_\_\_

Meetings: \_\_\_\_\_

Personal Time: \_\_\_\_\_

Customer Contact: \_\_\_\_\_

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Time	Activity
5:00 A.M.	_____
5:30 A.M.	_____
6:00 A.M.	_____
6:30 A.M.	_____
7:00 A.M.	_____
7:30 A.M.	_____
8:00 A.M.	_____
8:30 A.M.	_____
9:00 A.M.	_____
9:30 A.M.	_____
10:00 A.M.	_____
10:30 A.M.	_____
11:00 A.M.	_____
11:30 A.M.	_____
Noon	_____
12:30 P.M.	_____
1:00 P.M.	_____
1:30 P.M.	_____
2:00 P.M.	_____

Time	Activity
2:30 P.M.	_____
3:00 P.M.	_____
3:30 P.M.	_____
4:00 P.M.	_____
4:30 P.M.	_____
5:00 P.M.	_____
5:30 P.M.	_____
6:00 P.M.	_____
6:30 P.M.	_____
7:00 P.M.	_____
7:30 P.M.	_____
8:00 P.M.	_____
8:30 P.M.	_____
9:00 P.M.	_____
9:30 P.M.	_____
10:00 P.M.	_____
10:30 P.M.	_____
11:00 P.M.	_____

**Number of Hours Spent:**

Work: \_\_\_\_\_

Meals: \_\_\_\_\_

Phone: \_\_\_\_\_

Quality Time with

Internet: \_\_\_\_\_

Family Members: \_\_\_\_\_

Meetings: \_\_\_\_\_

Personal Time: \_\_\_\_\_

Customer Contact: \_\_\_\_\_

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Time	Activity
5:00 A.M.	_____
5:30 A.M.	_____
6:00 A.M.	_____
6:30 A.M.	_____
7:00 A.M.	_____
7:30 A.M.	_____
8:00 A.M.	_____
8:30 A.M.	_____
9:00 A.M.	_____
9:30 A.M.	_____
10:00 A.M.	_____
10:30 A.M.	_____
11:00 A.M.	_____
11:30 A.M.	_____
Noon	_____
12:30 P.M.	_____
1:00 P.M.	_____
1:30 P.M.	_____
2:00 P.M.	_____

Time	Activity
2:30 P.M.	_____
3:00 P.M.	_____
3:30 P.M.	_____
4:00 P.M.	_____
4:30 P.M.	_____
5:00 P.M.	_____
5:30 P.M.	_____
6:00 P.M.	_____
6:30 P.M.	_____
7:00 P.M.	_____
7:30 P.M.	_____
8:00 P.M.	_____
8:30 P.M.	_____
9:00 P.M.	_____
9:30 P.M.	_____
10:00 P.M.	_____
10:30 P.M.	_____
11:00 P.M.	_____

**Number of Hours Spent:**

Work: \_\_\_\_\_

Meals: \_\_\_\_\_

Phone: \_\_\_\_\_

Quality Time with

Internet: \_\_\_\_\_

Family Members: \_\_\_\_\_

Meetings: \_\_\_\_\_

Personal Time: \_\_\_\_\_

Customer Contact: \_\_\_\_\_

## Appendix D

### Daily Time Analysis Sheet

Use this time analysis sheet for one week to track how your time is spent, then make changes as you see fit to make the most productive use of your time.

Time	Activity
5:00 A.M.	_____
5:30 A.M.	_____
6:00 A.M.	_____
6:30 A.M.	_____
7:00 A.M.	_____
7:30 A.M.	_____
8:00 A.M.	_____
8:30 A.M.	_____
9:00 A.M.	_____
9:30 A.M.	_____
10:00 A.M.	_____
10:30 A.M.	_____
11:00 A.M.	_____
11:30 A.M.	_____
Noon	_____
12:30 P.M.	_____
1:00 P.M.	_____
1:30 P.M.	_____
2:00 P.M.	_____

Time	Activity
2:30 P.M.	_____
3:00 P.M.	_____
3:30 P.M.	_____
4:00 P.M.	_____
4:30 P.M.	_____
5:00 P.M.	_____
5:30 P.M.	_____
6:00 P.M.	_____
6:30 P.M.	_____
7:00 P.M.	_____
7:30 P.M.	_____
8:00 P.M.	_____
8:30 P.M.	_____
9:00 P.M.	_____
9:30 P.M.	_____
10:00 P.M.	_____
10:30 P.M.	_____
11:00 P.M.	_____

**Number of Hours Spent:**

Work: \_\_\_\_\_

Meals: \_\_\_\_\_

Phone: \_\_\_\_\_

Quality Time with

Internet: \_\_\_\_\_

Family Members: \_\_\_\_\_

Meetings: \_\_\_\_\_

Personal Time: \_\_\_\_\_

Customer Contact: \_\_\_\_\_



## Appendix E

### Goal Sheet

#### Yearly Goals

Work: \_\_\_\_\_

Home: \_\_\_\_\_

Personal: \_\_\_\_\_

Financial: \_\_\_\_\_

Community: \_\_\_\_\_

Spiritual: \_\_\_\_\_

#### Monthly Goals

Work: \_\_\_\_\_

Home: \_\_\_\_\_

Personal: \_\_\_\_\_

Financial: \_\_\_\_\_

Community: \_\_\_\_\_

Spiritual: \_\_\_\_\_

#### Weekly Goals

Work: \_\_\_\_\_

Home: \_\_\_\_\_

Personal: \_\_\_\_\_

Financial: \_\_\_\_\_

Community: \_\_\_\_\_

Spiritual: \_\_\_\_\_

### Daily Goals

Work: \_\_\_\_\_

Home: \_\_\_\_\_

Personal: \_\_\_\_\_

Financial: \_\_\_\_\_

Community: \_\_\_\_\_

Spiritual: \_\_\_\_\_

### Prioritized Yearly Goals for Work and Home Life

#### Work

Priority 1: \_\_\_\_\_

\_\_\_\_\_

Priority 2: \_\_\_\_\_

\_\_\_\_\_

Priority 3: \_\_\_\_\_

\_\_\_\_\_

#### Home

Priority 1: \_\_\_\_\_

\_\_\_\_\_

Priority 2: \_\_\_\_\_

\_\_\_\_\_

Priority 3: \_\_\_\_\_

\_\_\_\_\_

## Appendix F

### Sales Rejection Analysis Sheet

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_

Prospect's Name: \_\_\_\_\_

Date: \_\_\_\_\_

Products/Services Rejected: \_\_\_\_\_

\_\_\_\_\_

At What Step in the Process: \_\_\_\_\_

\_\_\_\_\_

Reason: \_\_\_\_\_

\_\_\_\_\_

What I could have done: \_\_\_\_\_

\_\_\_\_\_