BAG | WEEKLY CADENCE · BARNABAS CAPITAL

FOOTPRINT FRIDAYS

Share Progress. Drive Momentum. Win Together.

BY NOON

NAME

WEEK ENDING

1 YOUR TOP 3 ACCOMPLISHMENTS THIS WEEK

The action: a call made, an illustration sent, or a case placed.

	THE ACTION	ADVISOR / FIRM	PREMIUM	PRODUCT	DATE	TERRITORY / CHANNEL
1						
2						
3						

2 YOUR SIX BIGGEST ACCOMPLISHMENTS PLANNED FOR NEXT WEEK

Each one falls in one of three categories. Aim for two of each.

1 GETTING AHEAD OF THE SALE
Calls planned, a field day, an appointment

2 LEVERAGE COUNTERPARTS
Building coaches — wholesalers, marketers, BD contacts

3 SEND PAPER TO ADVISORS
Illustrations, proposals, and contracts in front of advisors

	CATEGORY	THE ACTION / DETAILS
1		
2		
3		
4		
5		
6		

3 1 GEM — SOMEONE WHO WENT THE EXTRA MILE

Recognize a teammate who went above and beyond for you or someone else.

TEAMMATE	WHAT THEY DID

Get ahead of the sale. Leverage industry counterparts. Know the revenue source.

Be intentional. Not active.