

New Agent Worksite Field Training Summary Report

Week of: _____

Agent: _____

Trainer: _____

MONDAY	
PAC Calls Completed:	

Results Legend:	CC	Case Closed
	AS	Appointment Set
	FU	Follow Up
	NE	Not Eligible
	NI	Not Interested

TUESDAY	
Total Businesses Contacted:	

	25%	50%	75%	100%
Trainer:				
Trainee:				

CC	AS	FU	NE	NI

WEDNESDAY	
Total Businesses Contacted:	

	25%	50%	75%	100%
Trainer:				
Trainee:				

CC	AS	FU	NE	NI

THURSDAY	
Total Businesses Contacted:	

	25%	50%	75%	100%
Trainer:				
Trainee:				

CC	AS	FU	NE	NI

FRIDAY	
Total Businesses Contacted:	

	25%	50%	75%	100%
Trainer:				
Trainee:				

CC	AS	FU	NE	NI

TOTALS	
Total Businesses Contacted:	

	25%	50%	75%	100%
Trainer:				
Trainee:				

CC	AS	FU	NE	NI

Definitions of percentages: 25% = Making the Gatekeeper Your Friend and Building Rapport
 50% = 25% + Introduction to the Decision Maker
 75% = 25%, 50% + Completing the Presentation
 100% = The entire presentation start to finish, handling client responses, completing the Required Forms Packet

Note to Trainer: The area below is to record new cases that were obtained from the prospecting activity recorded above. The purpose is to be able to use this as a coaching tool at a later date and help the new Agent see the connection between prospecting activity done weeks or even months ago, to cases that are closed and enrolled in the future. Keep this form in the Agent's training file and update it as the Agent closes and enrolls cases related to their first week of prospecting with their Trainer.

New Cases	Franchise #	Number of Employees	Enrolled Yes or No	Number of Employees Seen	Number of Employees Sold	AP Submitted