

90 DAY LO RESET

MY PROSPECTING PLAN

Choose the few business-development activities you can execute consistently.

This is not another tracking sheet. Your Production Pipeline is where you will track people, opportunities, leads and relationships. Use this page only to decide where you will focus and what activity you are committing to for the next 30 days.

Loan Officer: _____

Date: _____

1. WHERE WILL I FOCUS?

My PRIMARY prospecting / business-development focus for the next 30 days:

Why is this the best place for me to focus right now?

My SUPPORTING activity (optional):

2. MAKE IT SPECIFIC

FOCUS	WHO?	WHAT WILL I DO?	HOW OFTEN?	WHEN?
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Primary

Supporting

3. REALITY CHECK

Could I still do this during a busy week? ☐ Yes ☐ No - reduce or simplify it

What is most likely to knock this activity off my calendar?

What will I do when that happens?

4. MY 30-DAY COMMITMENT

For the next 30 days, I am committing to:

I will protect this activity on my calendar by:

COACHING REVIEW *Finalize this with your coach.*

Primary activity confirmed / adjusted:

Weekly target or frequency:

CoachKit habit to track: