

# New Agent Worksite Field Training Summary Report



Week of: \_\_\_\_\_

Agent: \_\_\_\_\_

Trainer: \_\_\_\_\_

MONDAY	
PAC Calls Completed:	

<b>Results Legend:</b>	<b>FU</b>	<b>Follow Up</b>
	<b>NE</b>	<b>Not Eligible</b>
	<b>NI</b>	<b>Not Interested</b>

TUESDAY	
Total Businesses Contacted:	

	20%	40%	60%	80%	100%
Trainer:					
Trainee:					

	FU	NE	NI
Trainer:			
Trainee:			

WEDNESDAY	
Total Businesses Contacted:	

	20%	40%	60%	80%	100%
Trainer:					
Trainee:					

	FU	NE	NI
Trainer:			
Trainee:			

THURSDAY	
Total Businesses Contacted:	

	20%	40%	60%	80%	100%
Trainer:					
Trainee:					

	FU	NE	NI
Trainer:			
Trainee:			

FRIDAY	
Total Businesses Contacted:	

	20%	40%	60%	80%	100%
Trainer:					
Trainee:					

	FU	NE	NI
Trainer:			
Trainee:			

TOTALS	
Total Businesses Contacted:	

	20%	40%	60%	80%	100%
Trainer:					
Trainee:					

	FU	NE	NI

**Definitions of percentages:**

- 20% = Getting to the gatekeeper
- 40% = Meeting the decision maker
- 60% = Setting an appointment with the decision maker
- 80% = Making a presentation to the Decision Maker
- 100% = Closed case with 125 paperwork and a employee list

**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