

Sample Action Planning Accountability Worksheet

Week/Action	Created By	Deployed By
<u>Week 1</u>		
STAR Business Planning Tool		
Organizational and Structural Chart		
<u>Weeks 2 & 3</u>		
Procedures Manual Menu		
AAA Ideal Client Profile Tool		
<u>Week 4</u>		
FORM Client Profiling Tool		
Goal Setting Worksheets		
<u>Week 5</u>		
Service Matrix		
Call Rotation Scripting		
<u>Week 6</u>		
Client Advisory Council Campaign		
Agendas		
<u>Week 7</u>		
Customer Conversion Tool		
<u>Week 8</u>		
Advocate Process		
<u>Week 9</u>		
Referral Scripting		
<u>Week 10</u>		
CAST Strategic Alliance Scripting		
<u>Week 11</u>		
Client Milestone & Moment-of-Truth Guidelines		
<u>Week 12</u>		
Target Marketing Checklist		