

Weekly Client Development Worksheet – Short Form

Week Beginning: _____

Existing and Past Clients. I will contact the following existing / past clients this week to catch-up or see how we are doing. (I suggest you try and contact 10% of existing / past clients each week by phone, email or at an event)

Clients Name	Entity
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- 1.
- 2.
- 3.

Face-to-Face Networking. I will attend the following events this week to see existing clients and / or meet new prospects.

- 1.
- 2.
- 3.

New Prospects. I will do the following (in addition to events) to find new prospects:

- 1.
- 2.
- 3.

Potential Projects. I need to pursue the following “top” opportunities (with either a proposal, unsolicited proposal, get an appointment, lunch, make a presentation, or follow-up) this week:

- 1.
- 2.
- 3.

Prospect database: Number of “qualified prospects” in my database:

Less than 10...10 to 20...20 to 30...30 to 40...40 to 50...50 to 60...60 to 70...70 to 80...80 to 90...90 to 100 More than 100

NEW SALES LAST WEEK \$\$\$\$\$\$\$\$\$\$\$\$\$ -

- 1.
- 2.

OTHER-