

Building a Center of Influence Engine

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The Relationship System Quarterly Activity Record

First Quarter: January – March

Year

Level 1 = in person only every 30 - 60 days

Level 2 = in person or by phone, every 90 - 120 days

For Example:

NAME	LEVEL	JANUARY	FEBRUARY	MARCH
John Doe	1	1/6 Met – discussed goals for the year	2/24 Met for lunch – introduced John to Jim Jones	3/8 Had coffee – discussed a potential prospect for me