姓名：_____ 日期：2020 年 月 日（星期一）- 2020 年 月 日（星期日）

| 甲部 | | | | | | 乙部 | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| No | 中文姓名 | 約會日期 dd/mm | 星期 | 約會時間 hh:mm | 約會地區簡稱 eg:CWB | 提醒約會 | 爽約 | 改時間 | 赴約 | ？次約會 | 搜集資料 | 推銷公司 | 推銷自己 | 推銷概念 | 索取預算 | 確認預算 | 客戶填表 | 建議書 | 提出成交 | 成交單數 | FYP (HK$) | 送保單 | 售後服務 | 索取轉介 | 招募面談 | 助攻會議 |
| 1 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total | | | | | | | | | | | | | | | | | | | | | | | | | |