

OFFICIAL
TEC DADDY PLANNER
2016

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2016

Record-keeping, appointments, time-management, goal-setting, and planning for service technicians, salespeople, contractors, and anyone else wanting to live a more organized and productive life.

"Success is not a product of hard work. It takes as much hard work to fail as it does to succeed.

"Success is not a matter of luck or good timing.

"Success does not happen by accident. Success happens on purpose.

"Success is a result of planning followed by deliberate right action."

— *Charlie Greer*

HVAC Profit Boosters, Inc.
Plumbing Profit Boosters
Electrical Profit Boosters

13620 Brynwood Lane
Fort Myers, FL 33912

1-800-963-4822 (US and Canada)
0011-1-239-454-1131 (International)

www.charliegreer.com

For more great sales training for service technicians, salespeople, contractors, and CSRs, see our product pages in the back of this book.

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PERSONAL INFORMATION

GENERAL INFORMATION

NAME

ADDRESS

CITY

STATE

ZIP

PHONE

FAX

CELL

COMPANY NAME

ADDRESS

CITY

STATE

ZIP

PHONE

FAX

CELL

LOST OR STOLEN CREDIT CARD INFORMATION

CARD NAME

PHONE

CARD NAME

PHONE

EMERGENCY INFORMATION

NOTIFY

RELATIONSHIP

PHONE

WORK PHONE

ADDRESS

CITY

STATE

ZIP

OR NOTIFY

RELATIONSHIP

PHONE

WORK PHONE

ADDRESS

CITY

STATE

ZIP

EMERGENCY INFORMATION

PHYSICIAN

PHONE

INSURANCE/HMO

POLICY #

ALLERGIES

BLOOD GROUP

AUTOMOBILE INFORMATION

INSURANCE CO.

POLICY #

BROKER

PHONE

DRIVERS LICENSE #

EXP

PLATE #

EXP

2016

January						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29					

March						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

April						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

May						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

June						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

July						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

August						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

October						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 1: New Year's Day, January 18: Martin Luther King Day, February 15: Presidents' Day,
 May 30: Memorial Day, July 4: Independence Day, September 5: Labor Day, October 10: Columbus Day,
 November 11: Veterans Day, November 24: Thanksgiving Day, December 25: Christmas Day, December 26: Christmas Day (observed)

2017

January						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

July						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 1: New Year's Day, January 2: New Year's Day (observed), January 16: Martin Luther King Day, February 20: Presidents' Day,
 May 29: Memorial Day, July 4: Independence Day, September 4: Labor Day, October 9: Columbus Day,
 November 10: Veterans Day (obs.), November 11: Veterans Day, November 23: Thanksgiving Day, December 25: Christmas Day

HOW TO USE THIS PLANNER:

1. Log your appointments as they happen. There's plenty of space for you to list whatever information you feel would be helpful about the customer, what you sold or quoted on that call, and for how much.
2. Circle the dollar amounts of items that were purchased by your customers for a quick and easy visual reference.
3. If you're planning on following up, make a note on when you plan to follow up, then go to that date in the Planner, and make an appointment with yourself to follow-up with that customer. (In that entry, I usually reference the date of the earlier contact.)
4. Complete the totals at the bottom of the page at the end of every day.

Abbreviations:

WTD = Week-to-Date

MTD = Month-to-Date

YTD = Year-to-Date

5. Complete the Annual Summary for the appropriate month at the end of each month.

Notes:

CALLS # is the total number of all calls you've run during a given period

CLOSING % is $\# \text{ SALES} \div \# \text{ CALLS} \times 100$

AVERAGE/CALL \$ is the $\text{SALES \$} \div \text{CALLS \#}$

AVERAGE/SALE \$ is $\text{SALES \$} \div \text{SALES \#}$

NOTES:

- Maintain a constant awareness of your average per call and your average per day. *Never quote anyone less than your average per call.*
- Set a minimum dollar amount of sales you plan to make per day. The key is **COMMITMENT!** If you commit to running calls on any individual day until you hit your goal, you'll find that you'll hit it well before quitting time, no matter what type of calls they dispatch to you.

There is one reason and one reason only why they hired you, put you in a uniform and sent you out on a service call; and that is to generate profits for the company.
— Charlie Greer

MONDAY, DEC 28	TUESDAY, DEC 29	WEDNESDAY, DEC 30
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

NOTES: _____

THURSDAY, DEC 31	FRIDAY, JAN 1	SATURDAY, JAN 2
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	SUNDAY, JAN 3
7	7	
8	8	
<i>New Year's Eve</i>	<i>New Year's Day</i>	

DAILY TOTAL: \$ _____	DAILY TOTAL: \$ _____	DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____	WTD TOTAL: \$ _____	WTD TOTAL: \$ _____
MTD TOTAL: \$ _____	MTD TOTAL: \$ _____	MTD TOTAL: \$ _____
YTD TOTAL: \$ _____	YTD TOTAL: \$ _____	YTD TOTAL: \$ _____
YTD # CALLS: _____	YTD # CALLS: _____	YTD # CALLS: _____
YTD # SALES: _____	YTD # SALES: _____	YTD # SALES: _____

From the moment they greet you for the first time, it must be clearly apparent that you expect to get along with them, that you expect them to cooperate, that you expect them to listen, that you expect them to believe you, that you expect them to want their problems resolved, that you expect them to be decisive, and that you expect them to buy from you.
 — **Charlie Greer**

MONDAY, JAN 4	TUESDAY, JAN 5	WEDNESDAY, JAN 6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

NOTES: _____

THURSDAY, JAN 7	FRIDAY, JAN 8	SATURDAY, JAN 9
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	SUNDAY, JAN 10
7	7	
8	8	

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

Why study salesmanship? You make more money, it makes the job easier, and people won't necessarily do what's in their own best interest.

— Charlie Greer

MONDAY, JAN 11	TUESDAY, JAN 12	WEDNESDAY, JAN 13
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

NOTES: _____

THURSDAY, JAN 14	FRIDAY, JAN 15	SATURDAY, JAN 16
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	SUNDAY, JAN 17
7	7	
8	8	

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

Success, in sales or otherwise, is a result of your state of mind. Get your mental life together and the rest of your life, including your service calls, will fall into place for you.
— Charlie Greer

MONDAY, JAN 18	TUESDAY, JAN 19	WEDNESDAY, JAN 20
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____
MTD TOTAL: \$ _____
YTD TOTAL: \$ _____
YTD # CALLS: _____
YTD # SALES: _____

NOTES: _____

THURSDAY, JAN 21	FRIDAY, JAN 22	SATURDAY, JAN 23
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	SUNDAY, JAN 24
7	7	
8	8	

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

DAILY TOTAL: \$ _____
 WTD TOTAL: \$ _____
 MTD TOTAL: \$ _____
 YTD TOTAL: \$ _____
 YTD # CALLS: _____
 YTD # SALES: _____

You can't make people buy, you can't talk them into buying, and you can't pressure them into buying. People buy of their own free will.

— *Charlie Greer*

MONDAY, JAN 25	TUESDAY, JAN 26	WEDNESDAY, JAN 27
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

DAILY TOTAL: \$ _____

WTD TOTAL: \$ _____

MTD TOTAL: \$ _____

YTD TOTAL: \$ _____

YTD # CALLS: _____

YTD # SALES: _____

NOTES: _____

THURSDAY, JAN 28	FRIDAY, JAN 29	SATURDAY, JAN 30
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	SUNDAY, JAN 31
7	7	
8	8	

DAILY TOTAL: \$ _____	DAILY TOTAL: \$ _____	DAILY TOTAL: \$ _____
WTD TOTAL: \$ _____	WTD TOTAL: \$ _____	WTD TOTAL: \$ _____
MTD TOTAL: \$ _____	MTD TOTAL: \$ _____	MTD TOTAL: \$ _____
YTD TOTAL: \$ _____	YTD TOTAL: \$ _____	YTD TOTAL: \$ _____
YTD # CALLS: _____	YTD # CALLS: _____	YTD # CALLS: _____
YTD # SALES: _____	YTD # SALES: _____	YTD # SALES: _____