

OFFICIAL

TEC DADDY PLANNER

2019

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)

charlie@charliegreer.com
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

2019

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 21: Martin Luther King Day, February 18: Presidents' Day, May 27: Memorial Day,
July 4: Independence Day, September 2: Labor Day, October 14: Columbus Day,
November 11: Veterans Day, November 28: Thanksgiving Day, December 25: Christmas Day

2020

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 20: Martin Luther King Day, February 17: Presidents' Day, May 25: Memorial Day,
July 3: Independence Day (obs.), July 4: Independence Day, September 7: Labor Day, October 12: Columbus Day,
November 11: Veterans Day, November 26: 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, choose a date and time, 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.

Instructions:

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

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

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

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

AVERAGE/DAY \$ = $\text{SALES \$} \div \text{WORK DAYS/MONTH OR YEAR \#}$

NOTES:

- Maintain a constant awareness of your average per call and your average per day. *Never quote anyone less than your average/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.

You can't teach morality and you can't teach ethics. People either have morals and ethics ... or they don't.

— Charlie Greer

MONDAY, DEC 24	TUESDAY, DEC 25	WEDNESDAY, DEC 26
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
<i>Christmas Eve</i>	<i>Christmas Day</i>	

DAILY GOAL: \$ _____	DAILY GOAL: \$ _____	DAILY GOAL: \$ _____
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: # _____

NOTES: _____

THURSDAY, DEC 27	FRIDAY, DEC 28	SATURDAY, DEC 29
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, DEC 30
7	7	
8	8	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

Don't ever recommend something just to sell something. Don't put anything on your list of recommendations that you wouldn't buy if you were in their position. — Charlie Greer

MONDAY, DEC 31	TUESDAY, JAN 1	WEDNESDAY, 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	6
7	7	7
8	8	8
<i>New Year's Eve</i>	<i>New Year's Day</i>	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

NOTES: _____

THURSDAY, JAN 3	FRIDAY, JAN 4	SATURDAY, JAN 5
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 6
7	7	
8	8	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

It's hypocritical to recommend Indoor Air Quality products and water treatment products when you don't own them yourself.

— Charlie Greer

MONDAY, JAN 7	TUESDAY, JAN 8	WEDNESDAY, 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	6
7	7	7
8	8	8

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

NOTES: _____

THURSDAY, JAN 10	FRIDAY, JAN 11	SATURDAY, JAN 12
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 13
7	7	
8	8	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

Good salespeople are not born ... they are made. Practice your salesmanship between calls instead of listening to music or talking on your mobile phone and you'll get a little better at it every day.

— Charlie Greer

MONDAY, JAN 14	TUESDAY, JAN 15	WEDNESDAY, 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	6
7	7	7
8	8	8

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

NOTES: _____

THURSDAY, JAN 17	FRIDAY, JAN 18	SATURDAY, JAN 19
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 20
7	7	
8	8	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

It's not as important that they like you as it is that they trust you. When you do quality work and look out for your customers' best interests, they do end up liking you anyway. — Charlie Greer

MONDAY, JAN 21	TUESDAY, JAN 22	WEDNESDAY, 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	
7	7	
8	8	
<i>Martin Luther King Day</i>		

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

NOTES: _____

THURSDAY, JAN 24	FRIDAY, JAN 25	SATURDAY, JAN 26
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 27
7	7	
8	8	

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____

A salesperson's job is to make people feel good about buying.

— Charlie Greer

MONDAY, JAN 28	TUESDAY, JAN 29	WEDNESDAY, 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	6
7	7	7
8	8	8

DAILY GOAL: \$ _____ DAILY GOAL: \$ _____ DAILY GOAL: \$ _____

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: # _____