OFFICIAL
TEC DADDY PLANNER
2018

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2018

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.

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

2018

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 15: Martin Luther King Day, February 19: Presidents' Day, May 28: Memorial Day,
July 4: Independence Day, September 3: Labor Day, October 8: Columbus Day, November 11: Veterans Day,
November 12: Veterans Day (observed), November 22: Thanksgiving Day, December 25: Christmas Day

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

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 # SALES ÷ # CALLS X 100
    > **AVERAGE/CALL $** is the SALES $ ÷ CALLS #
    > **AVERAGE/SALE $** is SALES $ ÷ SALES #

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.

2018 ANNUAL SUMMARY

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
MONTHLY CALLS #:													
MONTHLY SALES #:													
MONTHLY CLOSING %:													
MONTHLY SALES TOTAL $:													
MONTHLY AVERAGE/CALL $:													
MONTHLY AVERAGE/SALE $:													
WORK DAYS/MONTH #:													
MONTHLY AVERAGE/DAY $:													
YTD CALLS TOTAL #:													
YTD SALES TOTAL #:													
YTD CLOSING %:													
YTD SALES TOTAL $:													
YTD AVERAGE/CALL $:													

> *People want things done right. They know that they're not going to get the highest quality product, with the highest level of service for the lowest price.*
> — **Charlie Greer**

MONDAY, DEC 25	TUESDAY, DEC 26	WEDNESDAY, DEC 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
Christmas Day		

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: _____

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THURSDAY, DEC 28	FRIDAY, DEC 29	SATURDAY, 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	**SUNDAY, DEC 31**
7	7	
8	8	*New Year's Eve*

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: #**_____

> *You don't make sales with razzle-dazzle or fancy sales techniques. You make sales by delivering a superior level of service.*
>
> — **Charlie Greer**

MONDAY, JAN 1	TUESDAY, JAN 2	WEDNESDAY, JAN 3
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
New Year's Day		

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: _____

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THURSDAY, JAN 4	FRIDAY, JAN 5	SATURDAY, 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	**SUNDAY, JAN 7**
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: #_____

> *Whenever you're proposing something, make sure you land them on the "sense of urgency", which is the reason to take action now.*
>
> — Charlie Greer

MONDAY, JAN 8	TUESDAY, JAN 9	WEDNESDAY, JAN 10
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: #_____

YTD SALES: #_____   YTD SALES: #_____   YTD SALES: #_____

NOTES: _____

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THURSDAY, JAN 11	FRIDAY, JAN 12	SATURDAY, 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	**SUNDAY, JAN 14**
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: #_____

> *Salesmanship is not about answering questions or educating the consumer. Salesmanship is about closing.*
>
> **— Charlie Greer**

MONDAY, JAN 15	TUESDAY, JAN 16	WEDNESDAY, JAN 17
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
Martin Luther King Day		

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: _____

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THURSDAY, JAN 18	FRIDAY, JAN 19	SATURDAY, 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	**SUNDAY, JAN 21**
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: #_____

> *Never recommend a customer buy anything that you wouldn't buy yourself if you were in their position.*
>
> — **Charlie Greer**

MONDAY, JAN 22	TUESDAY, JAN 23	WEDNESDAY, JAN 24
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	

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: _____

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THURSDAY, JAN 25	FRIDAY, JAN 26	SATURDAY, 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	**SUNDAY, JAN 28**
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: #_____

> *Avoid repeating yourself. Once you've made your point, everytime you repeat yourself, you lose a point.*
> — *Charlie Greer*

MONDAY, JAN 29	TUESDAY, JAN 30	WEDNESDAY, JAN 31
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: #_____

YTD SALES: #_____ YTD SALES: #_____ YTD SALES: #_____

NOTES: _____
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_____

THURSDAY, FEB 1	FRIDAY, FEB 2	SATURDAY, FEB 3
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, FEB 4**
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: #** _____