

Let's Look Back on 2024

Name: _____

2024 Grade Card					
1. Prospecting	A	B	C	D	F
2. Time Management	A	B	C	D	F
3. Use of Technology	A	B	C	D	F
4. Life Balance	A	B	C	D	F
5. Truly Remarkable Service	A	B	C	D	F
6. Attitude	A	B	C	D	F
7. Team Leadership	A	B	C	D	F
8. Overall	A	B	C	D	F

My biggest success in 2024 was _____

My biggest challenge in 2024 was _____



What tool, system, or process are you missing that could help you in 2025?

Do you have a marketing budget? Y N \$ _____

Client events '25

Team events '25

Key Touches

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BHAG for '25: