

# Sample Action Planning Accountability Worksheet

Week/Action	Created By	Deloyed By
<b>Week 1</b>		
STAR Business Planning Tool		
Organizational and Structural Chart		
<b>Weeks 2 &amp; 3</b>		
Procedures Manual Menu		
AAA Ideal Client Profile Tool		
<b>Week 4</b>		
FORM Client Profiling Tool		
Goal Setting Worksheets		
<b>Week 5</b>		
Service Matrix		
Call Rotation Scripting		
<b>Week 6</b>		
Client Advisory Council Campaign		
Agendas		
<b>Week 7</b>		
Customer Conversion Tool		
<b>Week 8</b>		
Advocate Process		
<b>Week 9</b>		
Referral Scripting		
<b>Week 10</b>		
CAST Strategic Alliance Scripting		
<b>Week 11</b>		
Client Milestone & Moment-of-Truth Guidelines		
<b>Week 12</b>		
Target Marketing Checklist		

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