FE2 ESSENTIALS

Monday check-in

FE2

fe2.biz/essentials/#monday-check-in

Fifteen minutes, same time every Monday. Print one for each week, or keep one copy in a sleeve and write on a fresh sheet.

Date: Week number: Who attended:

1 Scorecard (3 minutes)

What moved the right way? What moved the wrong way?

2 The Monday lists (5 minutes)

List	How many	Owner	Done by
Signed up 7+ days ago, setup or first visit not done			
Started 7+ days ago, no first result			
Engaged trials or quotes ending within 7 days			
Failed payments not yet fixed			
Customers renewing in the next 30 days			
Customers showing a warning sign			

3 What customers told us (3 minutes)

Most common reasons from the follow-up log this week.

4 One thing to fix this week (3 minutes)

The fix	Owner	Done by

5 One win to share (1 minute)