

Client Name:

First Contact Notes:

CTD/OTR	Completed	Date	Notes
email 1 - Personal Email Invitation:			
email 2 - Prepping for Your Session w/ info form:			
schedule CTD/OTR:			
completed info form received:			
CTD/OTR Call:			
email 3 - Follow Up Info (undecided):			
email 4 - Program agreement sent:			
email 5 - Partnership agreements sent:			
program agreement signed:			
Schedule Session 1:			
Invoice sent:			
Investment:			

90 Day Program	Completed	Date	Notes
Session 1			
CAG 1			
Session 2			
CAG 2			
Session 3			
CAG 3			
Session 4			
CAG 4			
Session 5 Self Sabotage premail			
Session 5			
CAG 5			
Session 6			
CAG 6			
Session 7			
CAG 7			
Session 8			
CAG 8			
Session 9			
CAG 9			
Session 10			
CAG 10			
Session 11			
CAG 11			
Session 12			
CAG 12			