Sales Professional's To-Do List

Date: _____

Step 1: Determine type
P=Progress Item
M=Maintenance Item

Item (What)	Step 1 Type P / M	Step 2 Priority A, B, C, D (see below)	Action (Who, When, Where, How)	Step 3 Order 1, 2, 3 (see below)	Done ✓

Step 2: Set Priorities
A=Urgent & Important (high impact, time sensitive)
B=Important, Not Urgent (high impact, time insensitive)
C=Urgent, Not Important (low impact, time sensitive)
D=Not Urgent or Important (low impact, time insensitive)

Step 3: Set Order
1=Start with highest priority "P" items
2=Next do highest priority "M" items
3=Then do next highest priority "P" items
4=Then do next highest priority "M" items
5=Repeat the process

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A **"Progress"** task is one that moves a sales closer to a close.
A **"Maintenance"** task is one that, while moving forward, basically maintains the status quo and you're no closer to making a sale.
Administrative tasks (paperwork, non-sales meetings) are generally maintenance items.