

The SAM System At-a-Glance

Planner



Getting Started

- Complete your Simple Business Plan
- Go to the week-at-a-glance calendar pages and post your activity goals across the top

Keeping it Going

1. At the beginning of each week, post your activity goals across the top of the week-at-a-glance pages
2. Each day, keep score with the easy-to-use scorekeeping grids
3. At the end of each week, tally your scores and measure against your goals
4. Use the pages in the back of your planner to manage your practice

Collect

eScoreBoard™



Getting Started

- Get your UserID and Password from your manager or administrator
- Go to www.eScoreBoard.com
- Log on to eScoreBoard
- Change your password
- Watch Video Tour
- Set your goals using the Goals tab (Consult with your manager, if necessary)

Keeping it Going

1. Enter Activity:
 - o Online or via the email link reminder
 - o Weekly or Daily on
Day _____
Time _____
2. View reports to analyze performance and self-assess
3. Compare results to your goals
4. Be sure to zero out vacation weeks and if you miss a week, go back in and enter the activity

Analyze

One-on-one / PEP Session



Getting Started

- Schedule the meeting day with your manager/mentor/coach
Day _____
Time _____
- Enter it into your planner for the month (adjust as necessary)
- Review your week to prepare for the meeting and bring:
 - o Planner
 - o eScoreBoard Report(s)
 - o Case Files
 - o Production Report

Keeping it Going

1. Meet with your manager/mentor/coach (EWWFNE)
2. Review your goals, action plan and week to prepare for the meeting. Bring the following:
 - o Planner
 - o eScoreBoard Report(s)
 - o Case Files
 - o Production Report
3. Work together to create an action plan for improved performance
4. Execute the plan

Improve