QMAP Accountability Chart | 4Q 2016

**Prepared for:** [Firm name]

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|  | COI Activities | Client referral activities | Networking activities | Public Events | Blog/articles |
|  | **Goal** | **Actual** | **Goal** | **Actual** | **Goal** | **Actual** | **Goal** | **Actual** | **Goal** | **Actual** |
| [Advisor name] |   |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |
| [Advisor name] |  |  |  |  |  |  |  |  |  |  |

What worked this quarter? What were the results?

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What didn’t work this quarter?

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What innovative ideas did we try? What were the results?

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