

LEVEL UP EXECUTION SHEET • FILLABLE, PRINT IT OR TYPE IN IT

Win From the Room

1-5 THINGS ONLY

Fill it in as you go, not on the flight home. Every line gets a client, one KPI with today's number, a first step, and a team owner. Hand it off from the room.

NAME	AGENCY			DATE		
#	TAKEAWAY	CLIENT	KPI IT MOVES	FIRST STEP	HANDOFF	DUE
1	What I heard	Client name	☐ Leads ☐ Booking ☐ Conversion ☐ Answer ☐ Show ☐ Avg Ticket Today → target	Smallest version	Team owner ☐ Sent from the room	Due
2	What I heard	Client name	☐ Leads ☐ Booking ☐ Conversion ☐ Answer ☐ Show ☐ Avg Ticket Today → target	Smallest version	Team owner ☐ Sent from the room	Due
3	What I heard	Client name	☐ Leads ☐ Booking ☐ Conversion ☐ Answer ☐ Show ☐ Avg Ticket Today → target	Smallest version	Team owner ☐ Sent from the room	Due
4	What I heard	Client name	☐ Leads ☐ Booking ☐ Conversion ☐ Answer ☐ Show ☐ Avg Ticket Today → target	Smallest version	Team owner ☐ Sent from the room	Due
5	What I heard	Client name	☐ Leads ☐ Booking ☐ Conversion ☐ Answer ☐ Show ☐ Avg Ticket Today → target	Smallest version	Team owner ☐ Sent from the room	Due

WIN FROM THE ROOM • HOW TO USE IT

How to use this sheet to win, and why.

WHY

The room fire-hoses you. Keynotes, feature drops, hallway tips, dinners. All of it good, all of it at once. Most people fly home with a full notebook and nothing installed. Two weeks later they're still sorting it. Thirty days. Forty-five. I've been that guy.

The win isn't taking it all in. It's filtering it down to the 1–5 things that move a client's KPI, and handing them to your team before you leave the room. Do that, and your clients are seeing the upgrade by the time you get home.

HOW TO USE IT

- 1 Before you go.** Pull each top client's current numbers: Leads, Answer, Booking, Show, Conversion, Avg Ticket. That's your before number.
- 2 In every session.** Be present. Only write down what could move one of those numbers. Everything else goes on the later list.
- 3 After each session.** Take 5 minutes and fill one line: takeaway, client, KPI today → target, smallest first step, team owner, due date.
- 4 Send it from the room.** Message the owner right there, then check "Sent from the room." Not tonight. Not Monday. Now.
- 5 Every night.** Cut the sheet down to the best 1–5 for the whole event. The rest waits. No guilt.
- 6 When you're home.** Measure every line against its before number, every week. Their numbers, not your opinion.

RULES TO WIN

- 01 1–5 things only.**
- 02 One client per line.**
- 03 One KPI per line.**
- 04 Hand it off from the room.**
- 05 Measure it.**

Access is not progress. Implementation is.

RYAN FISHER