| Invesco US_BUSINESS COACHING_NORMAL - NEW | | |
|---|---|---|
| **FIELD** | **INSTRUCTION** | **ADDITIONAL NOTES** |
| **Task Description and Comments** | If the recording/note if from the HD App or click the + sign beside Task Description and Comments and type the FA name under Task Description. If there are multiple FAs or multiple notes under 1 task, type in the 1st FA name, et al. | |
| **Type** | Default: Normal – New | These are notes on the WS' calendars that we need to update |
| **Internal Comment** | WS Name | |
| **Special Instructions** | As specified | |
| **Date** | Skip | |
| **Name** | FA Name | ***** Check notes if there are other attendees dictated by the Business Coach.*** |
| **Text** | Skip | |
| **Event** | Skip | |
| **Meeting #** | Skip | |
| **Meeting Type** | Select appropriately | |
| **Meeting Subtype** | Select appropriately | |
| **Activity Status** | Completed | |
| **Program** | IGC – Business Consulting | |
| **Count Cross-check** | New = 2<br>All other Meeting Types = 1 | |