

Weekly Planner

WEEK OF: _____

THINGS TO DO

MONDAY	<p>THIS WEEK'S EVENTS:</p> <p><input type="checkbox"/> Virtual</p> <p><input type="checkbox"/> In-person</p> <p>CUSTOMER COMMUNICATIONS CHECKLIST:</p> <p><input type="checkbox"/> Tell customers about new products</p> <p><input type="checkbox"/> Tell customers about new promotions</p> <p><input type="checkbox"/> Tell customers about my new Beginner Classes</p> <p><input type="checkbox"/> Invite customers to my next event</p> <p><input type="checkbox"/> Share a video with my customers</p> <p><input type="checkbox"/> Book a meeting with a customer</p> <p>TEAM COMMUNICATIONS CHECKLIST:</p> <p><input type="checkbox"/> Congratulate Downline(s) on their successes</p> <p><input type="checkbox"/> Share what you're doing in your business</p> <p><input type="checkbox"/> Offer a team challenge</p> <p><input type="checkbox"/> Share something about a new product you like or current promo</p> <p><input type="checkbox"/> Share your upcoming team meeting/training dates</p> <p>THINGS TO DO:</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p>NOTES:</p>
TUESDAY	
WEDNESDAY	
THURSDAY	
FRIDAY	
SATURDAY	
SUNDAY	

Monthly Planner

MONTH: _____

MONTHLY GOALS

Personal sales this month last year: _____

Personal sales goal this month: _____

Actual sales this month: _____

Team sales this month last year: _____

Team sales goal this month: _____

Team sales this month: _____

Reach/Maintain Account Balance Level: 2/3/4/5 _____
(circle one)

of Beginner Classes I will hold: _____

MONTHLY WINS

Profit: _____

CM Credits earned: _____

Team commission: _____

of new customers: _____

of new team members: _____

of Beginner Classes held: _____

PERSONAL GOALS

Completed albums/pages: _____

Printed photos: _____

Use my CM profit to pay for: _____

What I learned this month: _____

What's a new idea I am going to try in this month? _____

New Advisor Checklist

MY JOIN DATE: _____

DAYS 1 TO 30

IN THE FIRST 30 DAYS I WILL:

- Watch the New Advisors Start Here My Course
- Join the New Advisor Facebook Group
- Add a profile picture to my account
- Set up Direct Deposit and enter my SSN in My Profile
- Schedule launch events and add to planner
- Create an invitation list of friends and family
- Connect weekly with my Upline
- Announce my new business on Facebook and Instagram and include my upcoming events
- Invite a friend to do the business with me
- Set up a work/craft area in my home (if I don't have one already)
- Place my first order and redeem my CM Credits and free gift for joining

DAYS 31 TO 60

IN THE NEXT 30 DAYS I WILL:

- Schedule events for the next 30 days (choose from the Beginner Class worksheet)
- Follow up with customers from the first 30 days
- Set up a Facebook Page for my Creative Memories business
- Connect weekly with my Upline
- Achieve the 60-day reward and new commission at Level 2
- Schedule a 1:1 Zoom Call with Jill Skaja, your Advisor Success Coordinator, to go over resources available to you
- Watch the Learn How to Do Beginner Classes My Course

DAYS 61 TO 90

IN THE FINAL 30 DAYS I WILL:

- Follow up with customers from previous events
- Welcome new team members
- Assist new team members with scheduling events and reaching Level 2 in their first 60 days
- Reach Level 3 and earn the new commission level