

When you set a personal goal,
everything is possible!



Jump-start a plan to fit your schedule, your goals and your life:

- Create a monthly plan.
- Take time to schedule your events each month.
- Review and document your big wins each month.
- Share your journey with your Upline and/or your fellow Advisors in the private Advisor Facebook Group!

MY COMMITMENTS

IN THE NEXT 12 MONTHS I WILL:

- Reach/Maintain Account Balance Level:
2/3/4/5 (circle one) \$ _____
- Grow my team by _____
- Teach a Project Recipe™ to a customer(s)
- Hold a crop or workshop
- Hold a card-making class
- Hold a Paper Buffet™
- Hold a National Scrapbook Day event (March/April/May)
- Hold a Croptoberfest event (Sept./Oct.)
- Have a table at a local craft fair or expo
- Hold a customer appreciation event such as an Open House or VIP customer event
- Refresh my personal albums, tools, papers, embellishments and stickers
- Create a Fast2Fab™ demo album to show customers
- Create a Complete Custom Album with refill pages
- Participate in a Virtual Crop
- Create/maintain a CM business Facebook page
- Create a team Facebook page (if applicable)
- Create new samples for my events using Project Recipes™ and blog post ideas

EACH MONTH I WILL:

- Make a monthly business plan
- Get together with or have a call with my Downline(s)
- Post on Facebook at least once every week
- Send email updates to my contact list when new products and promotions are launched
- Create a referral program I can promote to current customers
- Create an upcoming schedule of events that I can share online and with anyone I meet
- Celebrate every album that my customer(s) complete
- Touch base with each of my customers
- Work on an album or project of my own
 - "I have a goal to complete _____ albums/pages each month."
- Host these types of events:

NEED HELP?

Reach out to your Upline for guidance and assistance or contact the Home Office Advisor Success representative to help get you started: Sandra Northmore, SNorthmore@CreativeMemories.com

Find inspiration in the CM Advisor Group on Facebook. Join Today!
<https://www.Facebook.com/Groups/CMCanadaAdvisors>

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)

MONTHLY WINS

Profit: _____

Account Credits
Earned: _____

Team Commission: _____

New Customers: _____

New Team Members: _____

PERSONAL GOALS

Completed
Albums/Pages: _____

Printed Photos: _____

Use My CM
Profit to Pay For: _____

What I learned this month: _____

What I will do differently or try next month: _____

Weekly Planner

WEEK OF: _____

THINGS TO DO

MONDAY	<p>CUSTOMER COMMUNICATIONS CHECKLIST:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Tell customers about new products <input type="checkbox"/> Tell customers about new promotion <input type="checkbox"/> Tell customers about new Project Recipe™ <input type="checkbox"/> Invite customers to my next event <input type="checkbox"/> Share a video with my customers <input type="checkbox"/> Book a meeting with a customer <p>TEAM COMMUNICATIONS CHECKLIST:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Congratulate Downline on their successes <input type="checkbox"/> Share what you're doing in your business <input type="checkbox"/> Offer a team challenge <input type="checkbox"/> Share something about a favourite/new product or promo <p>THINGS TO DO:</p> <ul style="list-style-type: none"> <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <input type="checkbox"/> _____ <p>NOTES:</p>
TUESDAY	
WEDNESDAY	
THURSDAY	
FRIDAY	
SATURDAY	
SUNDAY	

Points Tracker

MY TOTAL REWARDS POINTS GOAL: _____

	TEAM GOAL	ACTUAL	POINTS EARNED (new team member x 25)*
November			
December			
January			
February			
March			

3 ways I will grow my team: _____

	SALES GOAL	ACTUAL	POINTS EARNED (every \$500 = 5 points)**
November			
December			
January			
February			
March			

3 ways I will grow my sales: _____

*New team members must reach level 2+ to qualify.

**Remember to subtract any sales that roll off your Account Balance. If you are not sure what this means, contact us at SNorthmore@CreativeMemories.com and we'll run through it with you!