

Weekly Planner

WEEK OF: _____

THINGS TO DO

MONDAY	<p>MAKE A PLAN:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Virtual options <input type="checkbox"/> In-person options <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 promotions <input type="checkbox"/> Tell customers about my new Beginner Classes <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(s) 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 new product you like or current promo <input type="checkbox"/> Share your upcoming team meeting/training dates <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"/> _____ <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 challenges completed from the Create the Best for Your Business Booklet: _____

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:

- | | |
|---|---|
| <input type="checkbox"/> Complete the "Charting My Course" chapter in the Create the Best for Your Business Guide | <input type="checkbox"/> Set up a work/craft area in my home (if I don't have one already) |
| <input type="checkbox"/> Schedule launch events | <input type="checkbox"/> Place my first order and redeem my CM Credits for joining |
| <input type="checkbox"/> Create an invitation list of friends and family | <input type="checkbox"/> The Penny app makes this outreach fun and easy! Get it today on the Apple or Google App Store and then visit the Penny landing page for all the tips you need to get started: Love.CreativeMemories.com/Penny-App-US-CA-AU/ |
| <input type="checkbox"/> Schedule the days I want to host/attend events in my planner | |
| <input type="checkbox"/> Announce my new business on Facebook and Instagram | |
| <input type="checkbox"/> Connect weekly with my Upline | |
| <input type="checkbox"/> Invite a friend to do the business with me | |

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 VIP Facebook Group for my customers
- Connect weekly with my Upline
- Achieve the 60-day reward and new commission at Level 2

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