

# MONTH AT A GLANCE

*Is what I'm doing this month helping to build this National Area?*

## **Remove all visual clutter**

- Create a distraction-free environment. This is **MY** time to plan **MY** month.
  - Have music, clean desk, good lighting, etc.
  - I do not answer the phone during this time
  - As the unit has grown, so has this time period

## **FOCUS FOR THE MONTH:**

Theme: \_\_\_\_\_

Pre-Party Theme for next month: \_\_\_\_\_

Promotions that support theme/goal/training: \_\_\_\_\_

Training focus for the Quarter: \_\_\_\_\_

Company Theme and Promos: \_\_\_\_\_

Goal for the Month: \_\_\_\_\_

Communication Plan: \_\_\_\_\_

## **Key People for the Month:**

- 1.
- 2.
- 3.
- 4.
- 5.

MY PERSONAL FOCUS FOR THIS MONTH IS: \_\_\_\_\_

TAKING CHARGE COMMISSION CHECK: \$ \_\_\_\_\_

PRODUCTION GOAL TO MEET COMMISSION CHECK GOAL : \_\_\_\_\_

*Set Personal Goals before looking at Unit Goals. I want to lead by example. If, after looking at the unit goals, I need to go back and change Personal Goals, that's okay. I must proactively pursue my personal goals; otherwise I find myself in a responsive state to the unit's needs and I never get anything accomplished for myself. I am not leading by example when I do this.*

## **PERSONAL GOALS AND APPOINTMENTS:**

- Personal Interviews Goal:
- Personal New Team Members Goal:
- Retail Sales Goal:
- Company Contests I'm tracking:

## **MONTHLY NOTEBOOK:**

- Potential Selling Appointment List:
- To Interview List:
- Past Interviews/Follow up list (Personal and Unit)
- Company Contests I'm tracking:

## **STRATEGY SESSION**

- Analyze Prior Month
- Focus Folder
- Production Goal Tracking Form
- Production Forecast Sheet
- Moving Up List on White Board – Stars, Seniors, RJ, On-Targets and DIQ's
- Who needs to order this month? (Write on Sheet)
- Highlight on print out Key People, New People and Base Unit Calls.
- E mail to Unit reflecting on previous month, sharing goals for upcoming month, upcoming interview schedule etc.
- Write Inspirational notes and postcards to Unit members!

## **UPDATE CALENDAR/WEEKLY PLAN SHEET**

- MNL
- Marketing Calls
- Guest Events
- Appointment Times
- Interview Times
- Personal Events
- Training/Special Events
- Last Working Day of Month Cleared

## **Projects I am working on:** *\*No more than two monthly projects at a time!*

- 1.
- 2.

## **Administrative Tasks that I do:**

- Close out last month
- Remove old promotions and tracking sheets
- New Career Level Mailings – who has moved up? Create list for assistant.
- Newsletter letter
- Answer and Delete E-mails
- Order Prizes
- Order from Director's Sheet
- Sign Consultant Birthday Cards/Consultant Anniversary Cards
- Update Business in a book: Director Promotions, Unit Promotions
- Whiteboards/Goal Posters
- Anything Tracking
- Update Systems and make sure they are operating smoothly
- Update New Consultant Folders and Key People
- Email Website updates

**I FEEL GREAT! I am ready, with a plan, to conquer this new month!**

## **MONTH END REFLECTION:**

### **RESULTS:**

1. Unit Wholesale:
2. Unit Retail:
3. Percentage increase over last year:
  - a. Unit Wholesale:
  - b. Unit Retail:
4. Number of Unit Interviews:
5. Number of Unit Recruits:
6. Unit Size:
7. Personal Wholesale:
8. Personal Retail:
9. Number of personal Recruits:
10. Percentage increase over last year:
  - a. Personal Wholesale:
  - b. Personal Retail:

### **PERSONAL EVALUATION:**

What worked last month? \_\_\_\_\_

What didn't work? \_\_\_\_\_

Are my priorities in order? \_\_\_\_\_

Am I being disciplined with my time? \_\_\_\_\_

What can I improve upon this month? \_\_\_\_\_

### **UNIT EVALUATION:**

What is my Unit's Strength? \_\_\_\_\_

What is my Unit's Weakness? \_\_\_\_\_