



CEO of Me[®]
Direct Sales Success System

ceof.me





Goals & plans

I get up every morning both determined to change the world and to have one heck of a good time. Sometimes this makes planning my day difficult. - E.B. White



My Vision Board



My Best Life

What are your top values?

What do you not ever want to have to sacrifice & why?

What drives you to continue moving forward in your life and business?

What does success in life mean to you? *(Not anyone else's definition or comparing yourself to anyone else.)*

What does success in business mean to you? *(Not anyone else's definition or comparing yourself to anyone else.)*

What does living "your best life" mean to you? How would a typical day be spent? What emotions, characteristics, lifestyle, financial, home, relationships, mental and physical state would you be in?

What one word or phrase will you commit to living by in order to always be creating and living your best life?

My Goals & Dreams

The reason I joined my company is...

The things that are most important to me and that I enjoy the most are...

If I could wave a magic wand and change anything in my life, I would change...

I need this the most in my life right now...

The hopes and dreams I have for myself & my family are...

My ideal day would look like (how I feel, my schedule, what I would spend my time doing)...

It will take this much money each month / year for me to achieve my dreams... \$_____

If I could make that income, the first thing I would do is...

The main goals I hope to achieve in my business are...

I am willing to commit _____ days or _____ hours each week to my business to achieve my dreams.

I think my greatest strength that will help me succeed is...

I can use this strength to help me succeed by...

I think my greatest weakness that might hold me back from achieving my goals is...

I can overcome that weakness by ...

My goals for the next 3 months, 6 months & 1 year are:

3 Months:

6 Months:

1 Year:

Goal planner

Goal: _____ Goal Date: _____

My Motivation for achieving this goal:

Steps to Take & Milestones to Achieve:

How I will celebrate:

Goal: _____ Goal Date: _____

My Motivation for achieving this goal:

Steps to Take & Milestones to Achieve:

How I will celebrate:

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How I will celebrate:

Goal: _____ Goal Date: _____

My Motivation for achieving this goal:

Steps to Take & Milestones to Achieve:

How I will celebrate:

Goal: _____ Goal Date: _____

My Motivation for achieving this goal:

Steps to Take & Milestones to Achieve:

How I will celebrate:



Schedule

The secret of getting ahead is getting started.
The secret of getting started is breaking
your complex overwhelming tasks into small
manageable tasks and starting on
the first one. - Mark Twain

Monthly Action Plan

Month of: _____

Goals

Income:

Parties:

Recruits:

Team:

Other:

Business Tasks

- Business Hours Scheduled
- Business Supplies Ordered
- Business Materials Labeled
- Party Folders & Demo Kit Updated
- Host, Recruit, Fund. Packets Prep.
- Customer Goody Bags Prepared
- Team Prizes & RAKS Ready / Mailed
- Thank You Notes Ready / Mailed
- Monthly Income/Exp. Recorded
- Monthly Office Purge
- Monthly Email Purge

Marketing

Social Media:

- Products to Feature:
- Holidays / Events / Seasonal Ideas:
- Monthly Contest/Giveaway:
- Lifestyle Posts:
- Other:
- Posts Scheduled:
 Wk 1 Wk 2 Wk 3 Wk 4

Newsletter / Blog Post(s):

- Products to Feature:
- Tip or Idea:
- Special Offers:
- Other:
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- Blog Post(s) Published & Promoted

Vendor & Networking Events:

Date	Event Name
_____	_____
_____	_____
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_____	_____

Parties:

Date	Host Name
_____	_____
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Training & Meetings

Date	Time	Location / Link
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January

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Friday

Saturday

Sunday

Goals





Notes & Ideas

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Date	Time	Location / Link
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February

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Friday

Saturday

Sunday

Goals





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Training & Meetings

Date	Time	Location / Link
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March

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Friday

Saturday

Sunday

Goals





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Training & Meetings

Date	Time	Location / Link
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April

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Friday

Saturday

Sunday

Goals





Notes & Ideas

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_____	_____

Training & Meetings

Date	Time	Location / Link
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May

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Friday

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Training & Meetings

Date	Time	Location / Link
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June

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Friday

Saturday

Sunday

Goals





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Parties:

Date	Host Name
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Training & Meetings

Date	Time	Location / Link
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July

Monday	Tuesday	Wednesday	Thursday
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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Friday

Saturday

Sunday

Goals





Notes & Ideas

Monthly Action Plan

Month of: _____

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Parties:

Date	Host Name
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Training & Meetings

Date	Time	Location / Link
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August

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<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Friday

Saturday

Sunday

Goals





Notes & Ideas

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Training & Meetings

Date	Time	Location / Link
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September

Monday Tuesday Wednesday Thursday

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Friday

Saturday

Sunday

Goals





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Parties:

Date	Host Name
_____	_____
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Training & Meetings

Date	Time	Location / Link
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_____	_____	_____
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October

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Friday

Saturday

Sunday

Goals





Notes & Ideas

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_____	_____

Training & Meetings

Date	Time	Location / Link
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November

Monday Tuesday Wednesday Thursday

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Friday

Saturday

Sunday

Goals





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Parties:

Recruits:

Team:

Other:

Business Tasks

- Business Hours Scheduled
- Business Supplies Ordered
- Business Materials Labeled
- Party Folders & Demo Kit Updated
- Host, Recruit, Fund. Packets Prep.
- Customer Goody Bags Prepared
- Team Prizes & RAKS Ready / Mailed
- Thank You Notes Ready / Mailed
- Monthly Income/Exp. Recorded
- Monthly Office Purge
- Monthly Email Purge

Marketing

Social Media:

- Products to Feature:
- Holidays / Events / Seasonal Ideas:
- Monthly Contest/Giveaway:
- Lifestyle Posts:
- Other:
- Posts Scheduled:
 ___ Wk 1 ___ Wk 2 ___ Wk 3 ___ Wk 4

Newsletter / Blog Post(s):

- Products to Feature:
- Tip or Idea:
- Special Offers:
- Other:
- ___ Newsletter Scheduled / Sent
- ___ Blog Post(s) Published & Promoted

Vendor & Networking Events:

Date	Event Name
_____	_____
_____	_____
_____	_____
_____	_____

Parties:

Date	Host Name
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
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_____	_____
_____	_____

Training & Meetings

Date	Time	Location / Link
_____	_____	_____
_____	_____	_____
_____	_____	_____
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December

Monday Tuesday Wednesday Thursday

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Friday

Saturday

Sunday

Goals





Notes & Ideas



Notes & Ideas

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

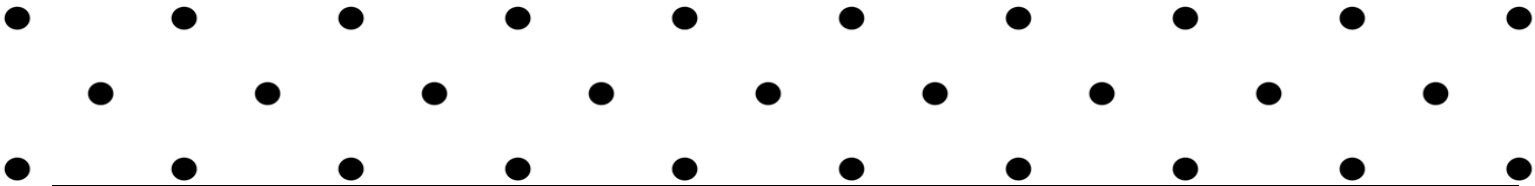
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



Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

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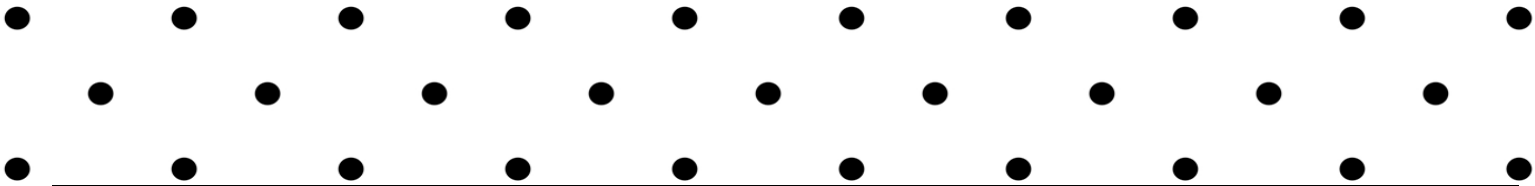
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Goals

MARKETING

SOCIAL MEDIA/BLOG

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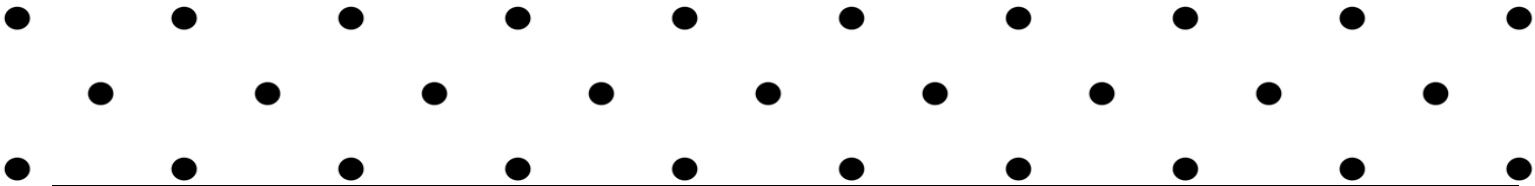
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



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Notes & Ideas



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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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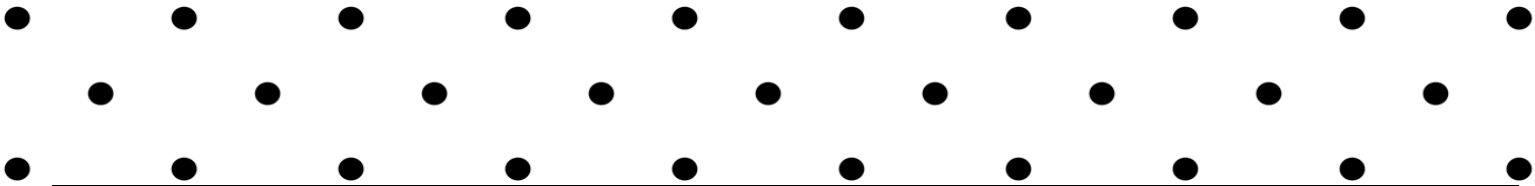
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





Notes & Ideas



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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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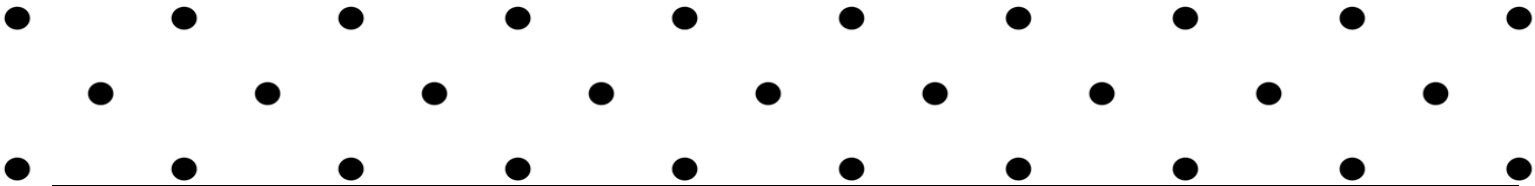
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





Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

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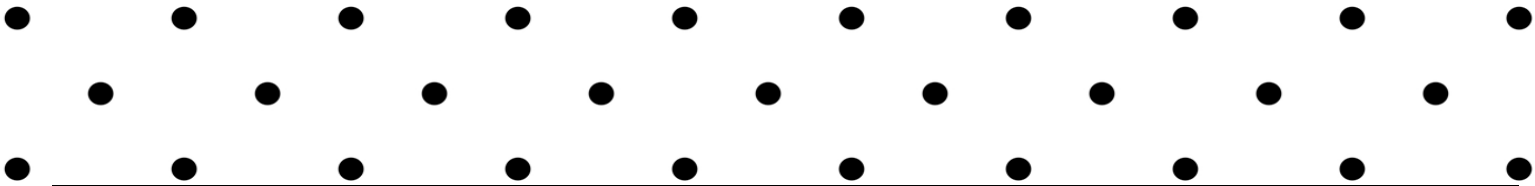
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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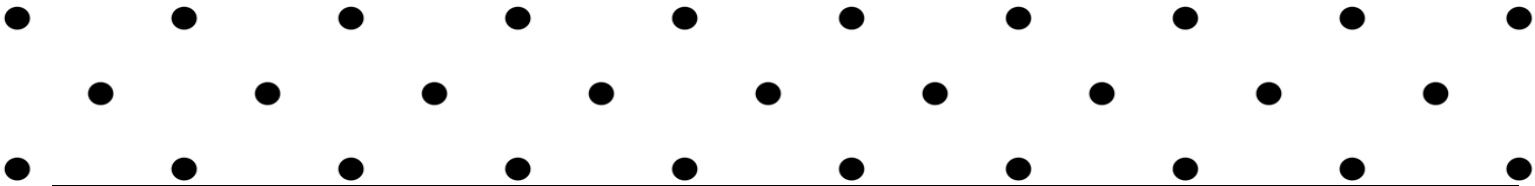
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





Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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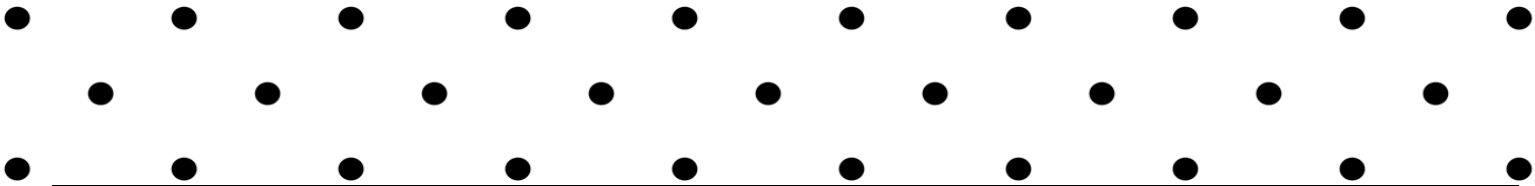
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

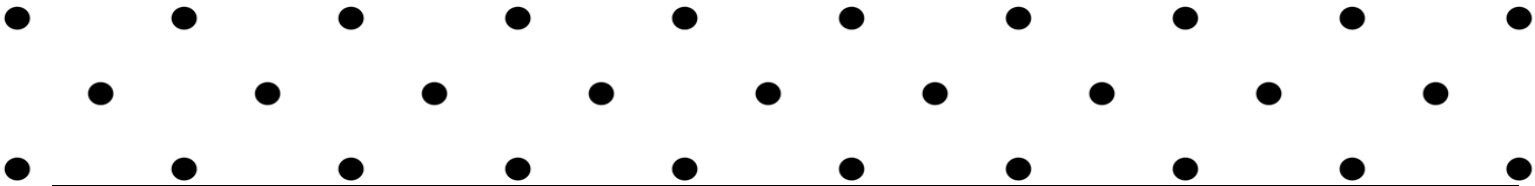
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



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Notes & Ideas



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Goals

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SOCIAL MEDIA/BLOG

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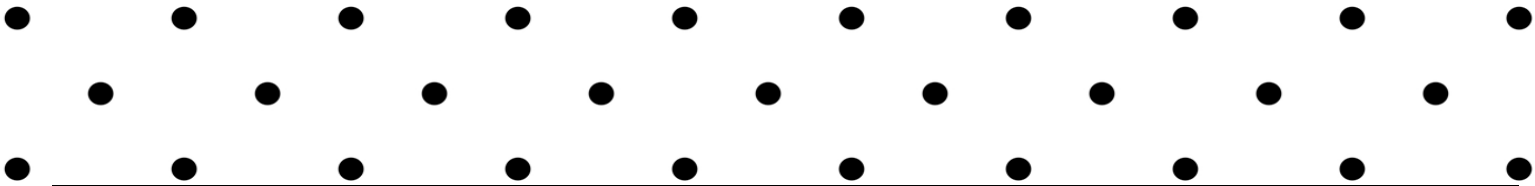
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



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Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

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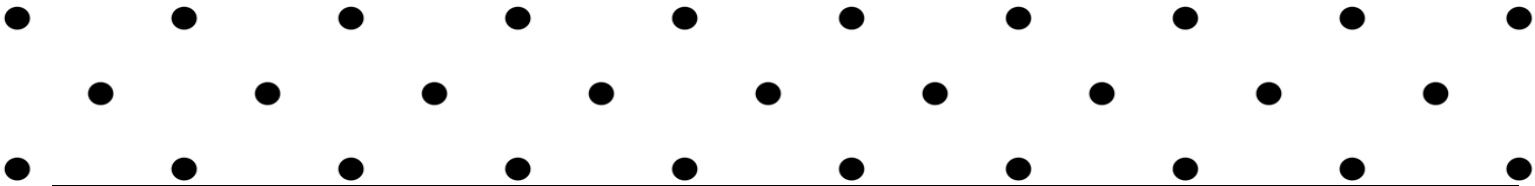
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



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Notes & Ideas



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Goals

MARKETING

SOCIAL MEDIA/BLOG

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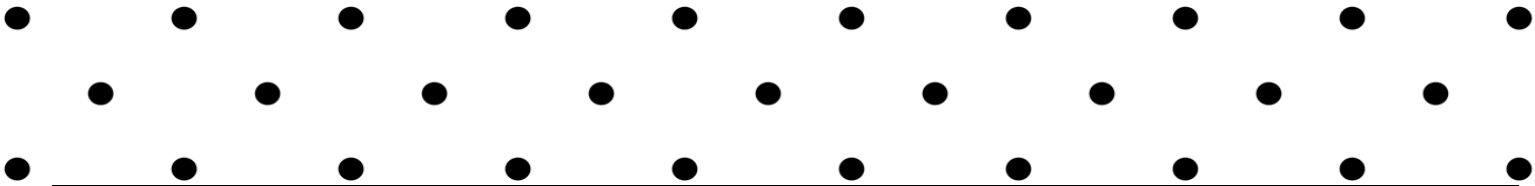
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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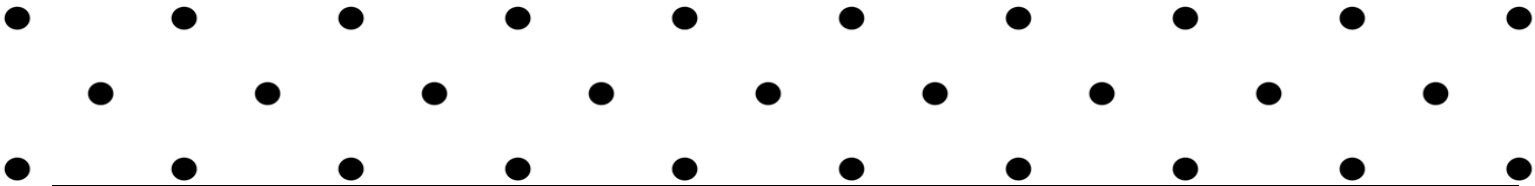
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





Notes & Ideas



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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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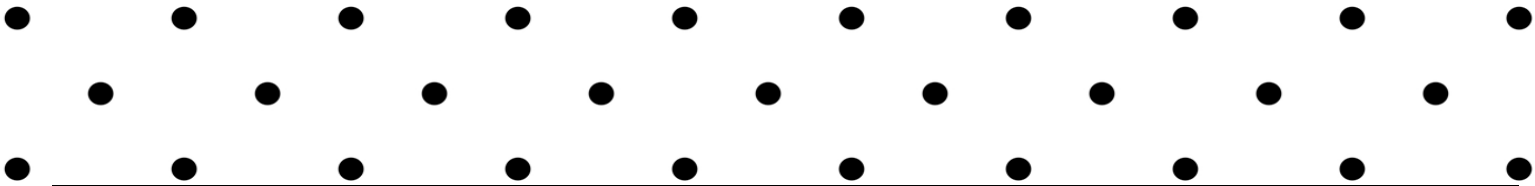
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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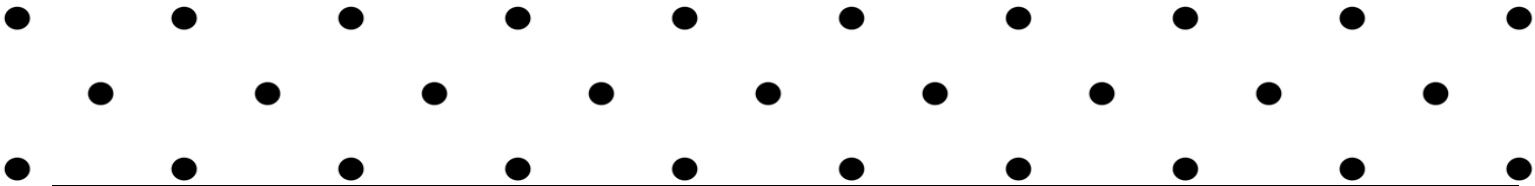
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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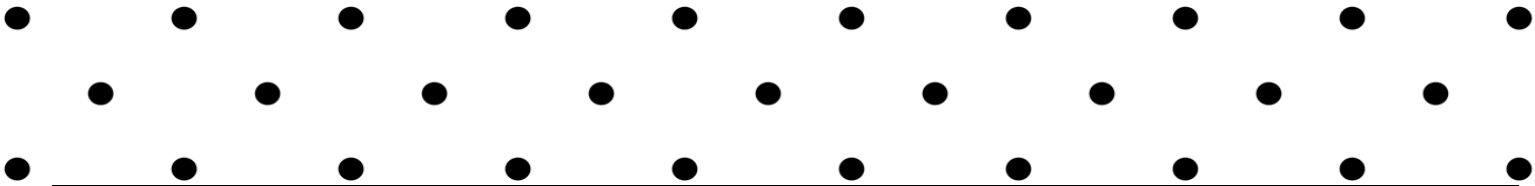
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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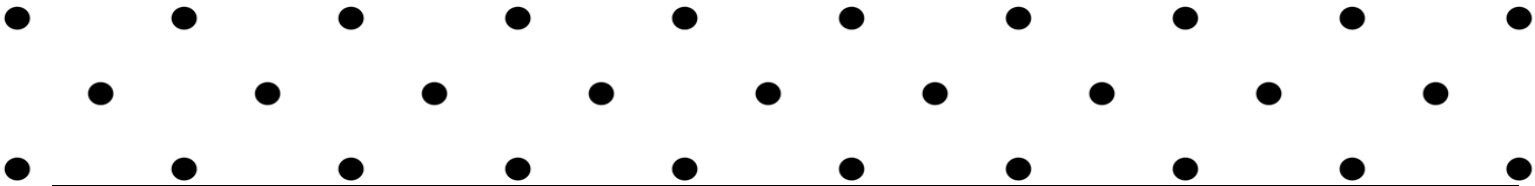
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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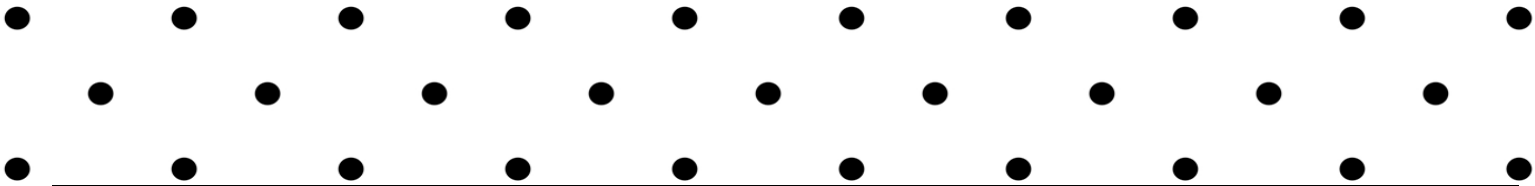
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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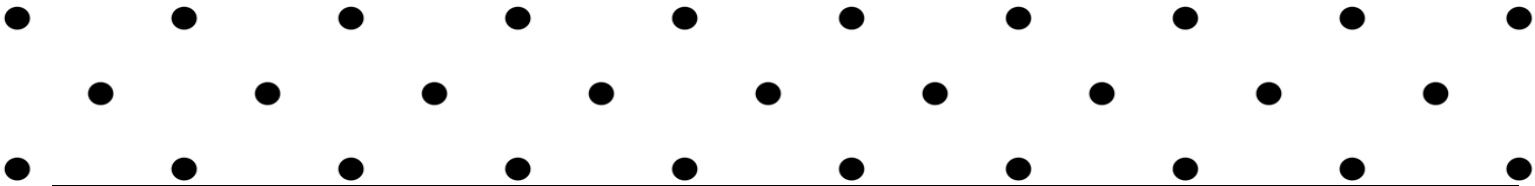
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

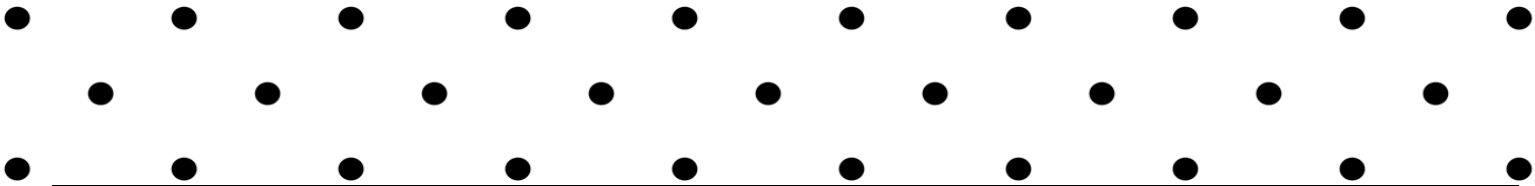
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

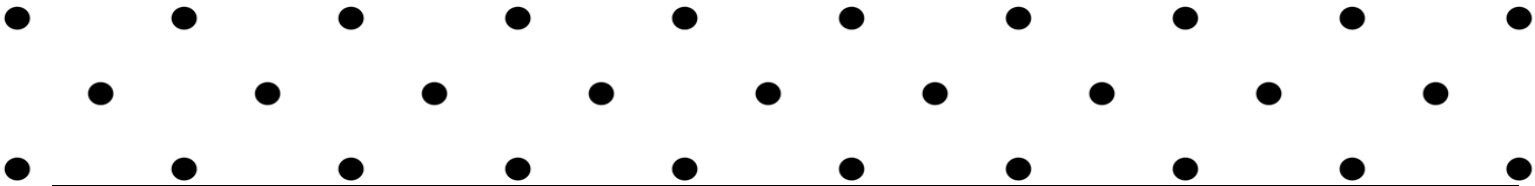
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



Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

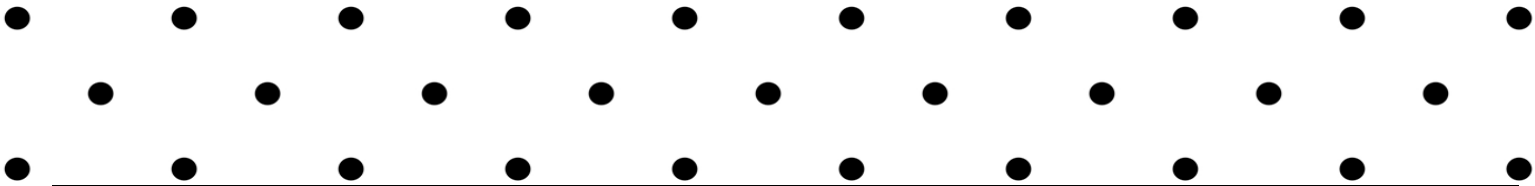
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Tuesday





Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

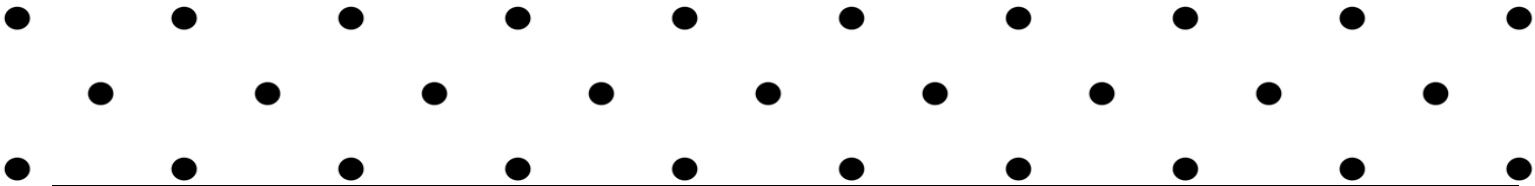
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



Tuesday

Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

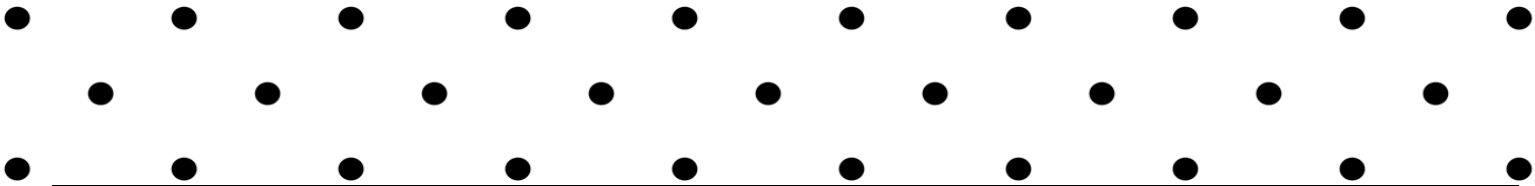
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



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Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

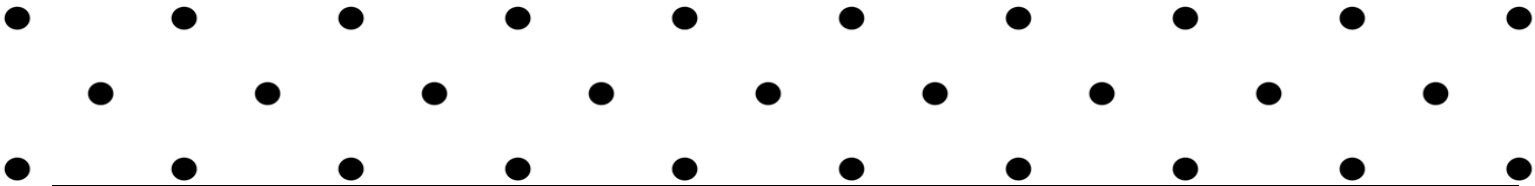
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Tuesday





Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

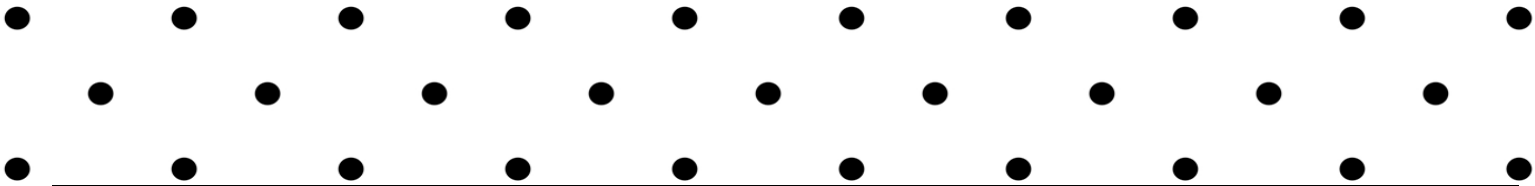
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Tuesday





Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

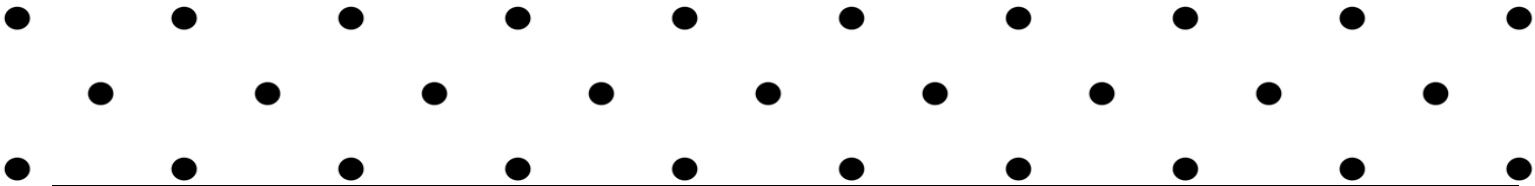
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Tuesday





Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

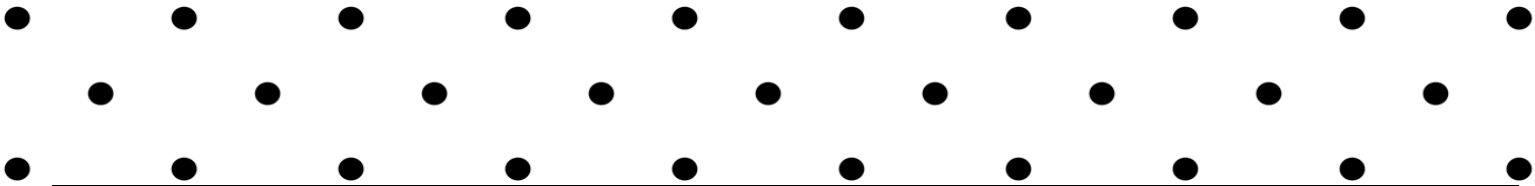
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Tuesday





Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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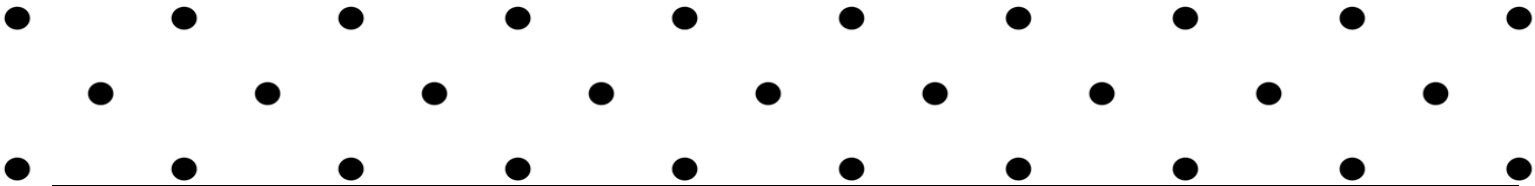
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Wednesday







Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

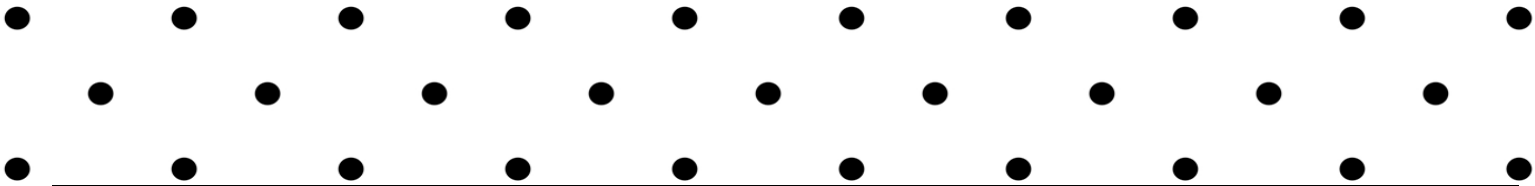
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Tuesday





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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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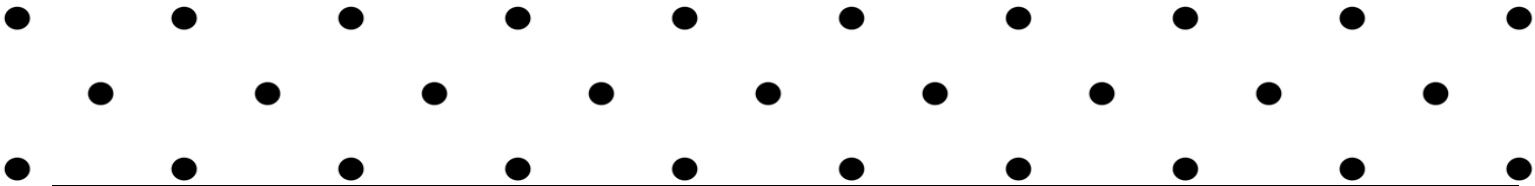
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





Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

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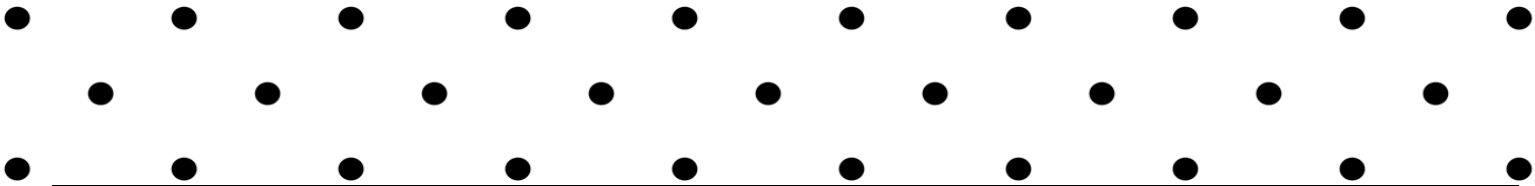
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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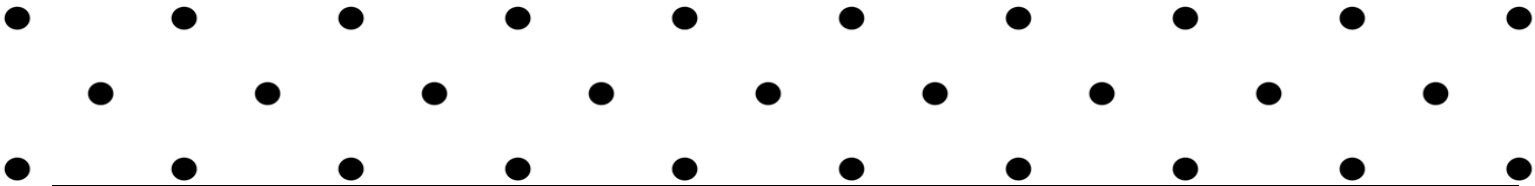
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

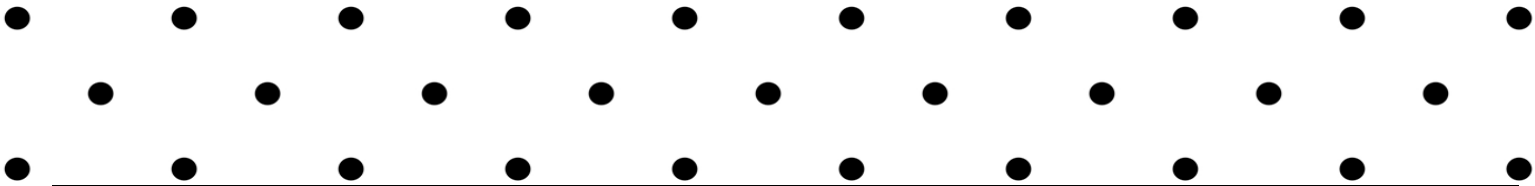
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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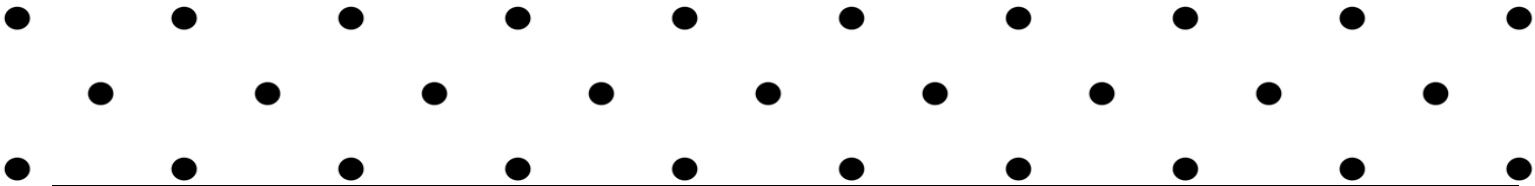
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





Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

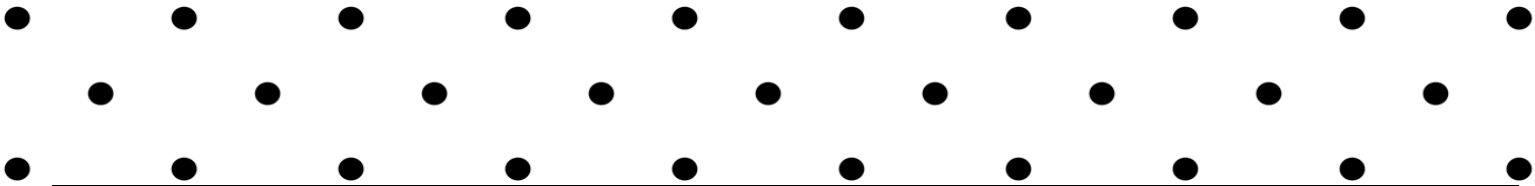
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



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Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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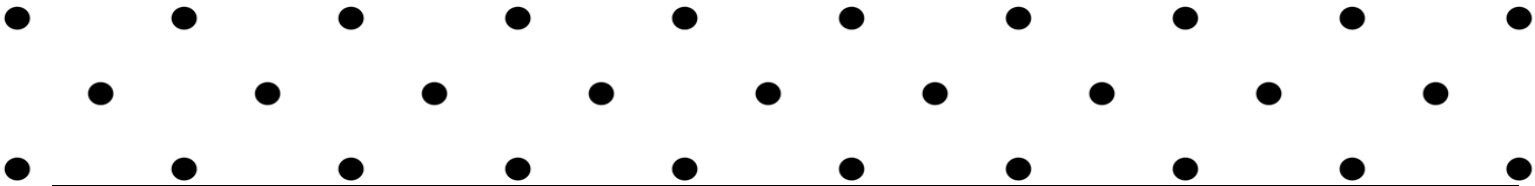
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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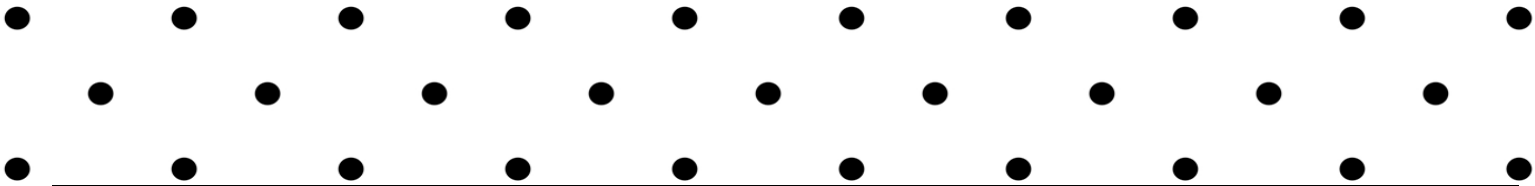
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

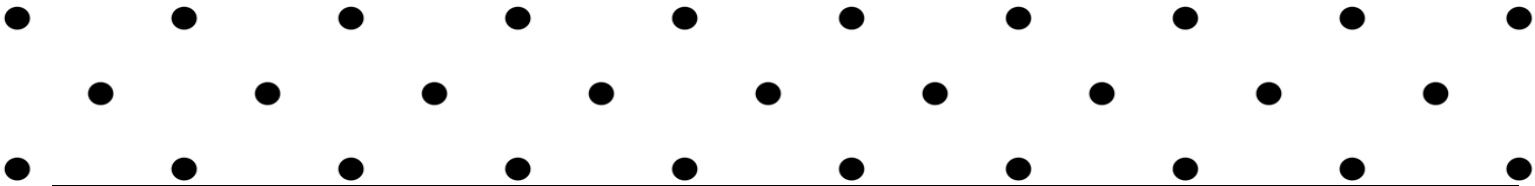
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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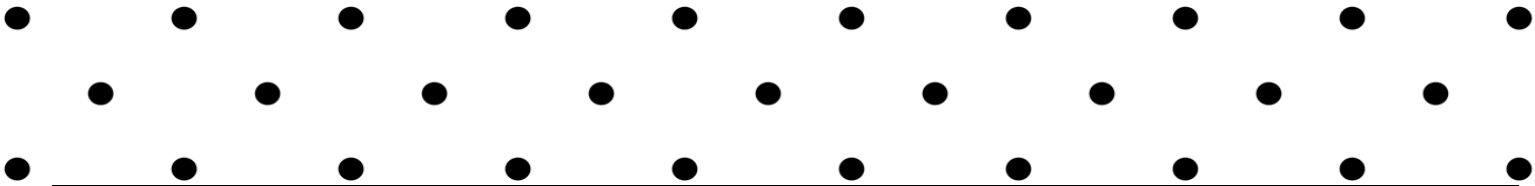
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





Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

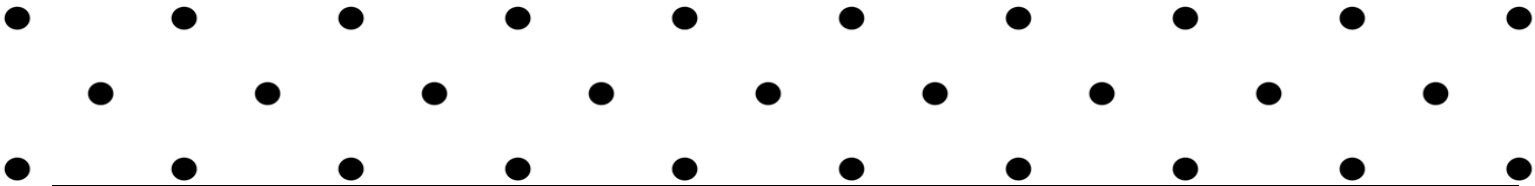
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



Wednesday

Notes & Ideas



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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

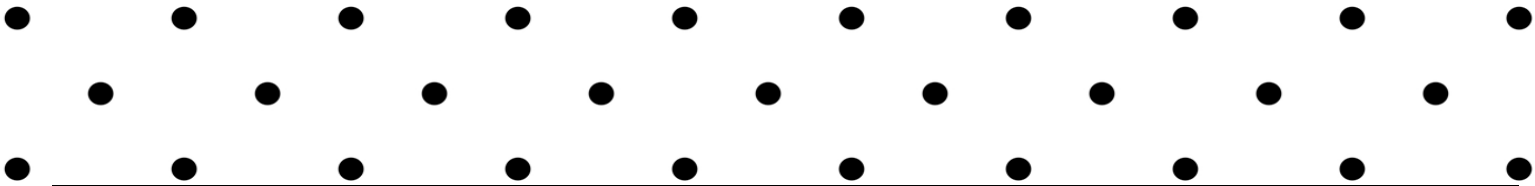
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

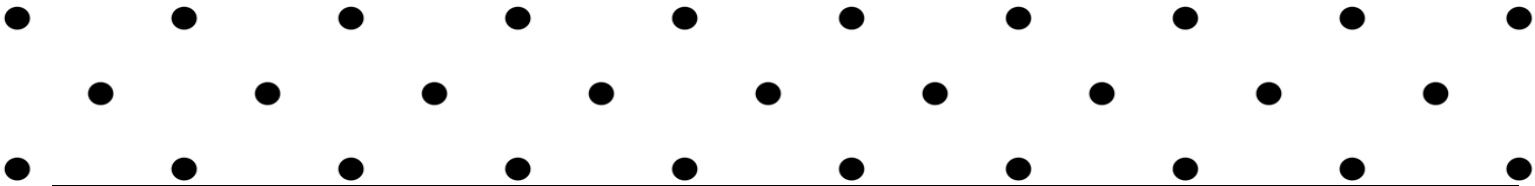
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



Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

Goals

MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

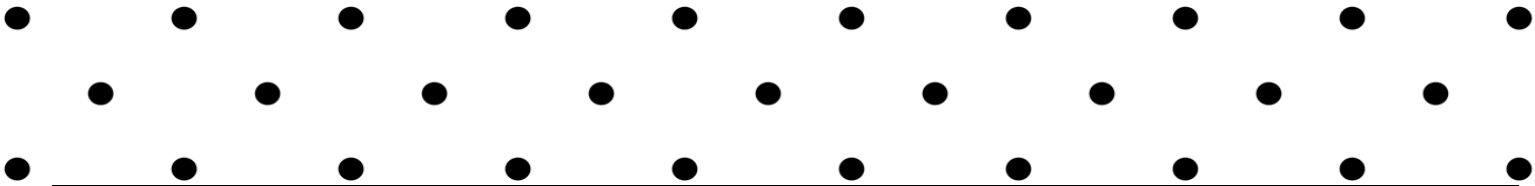
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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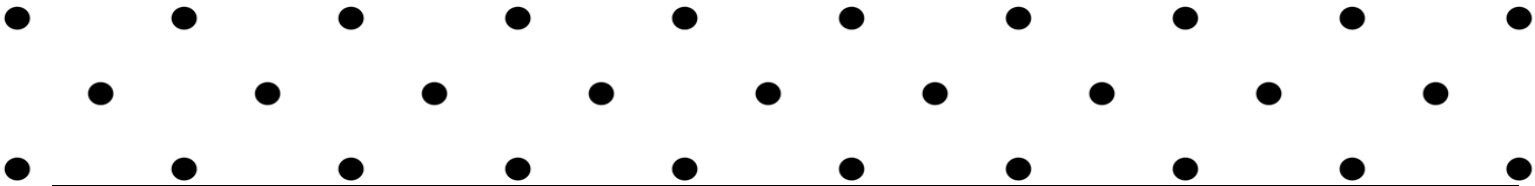
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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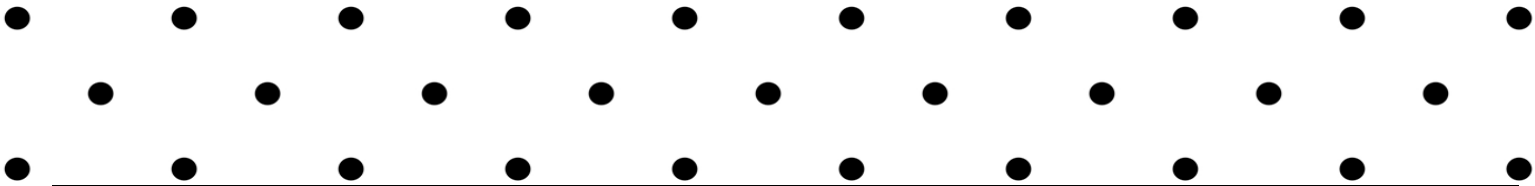
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Gratitude & Reflections

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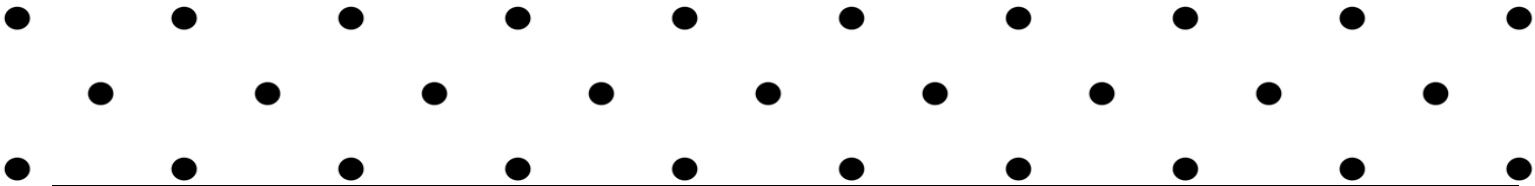
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



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Wednesday

Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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<i>Thursday</i>	<i>Friday</i>	<i>Saturday</i>	<i>Sunday</i>
			

Gratitude & Reflections

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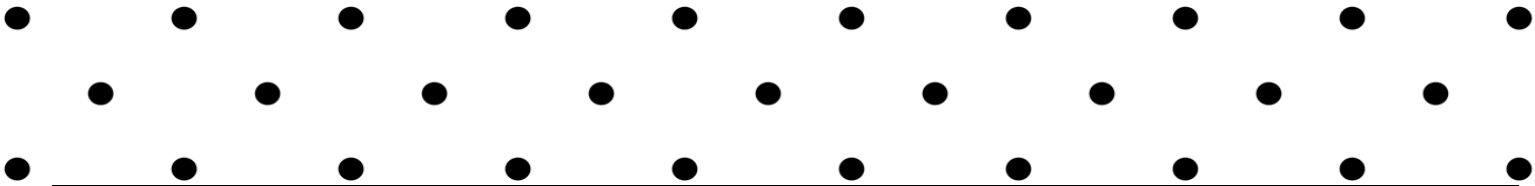
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

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CUSTOMERS

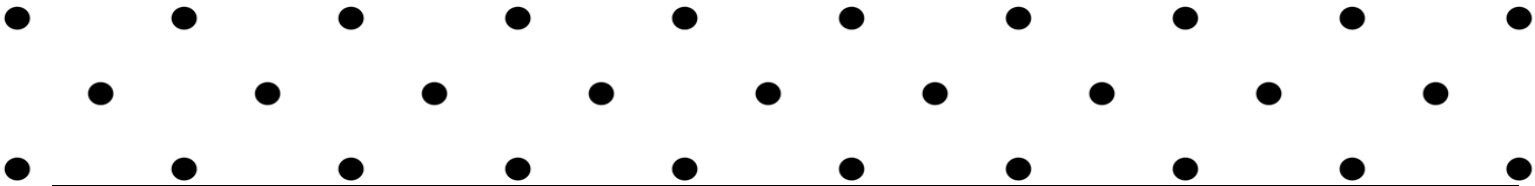
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



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Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

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MARKETING

SOCIAL MEDIA/BLOG

CUSTOMERS

To Do List

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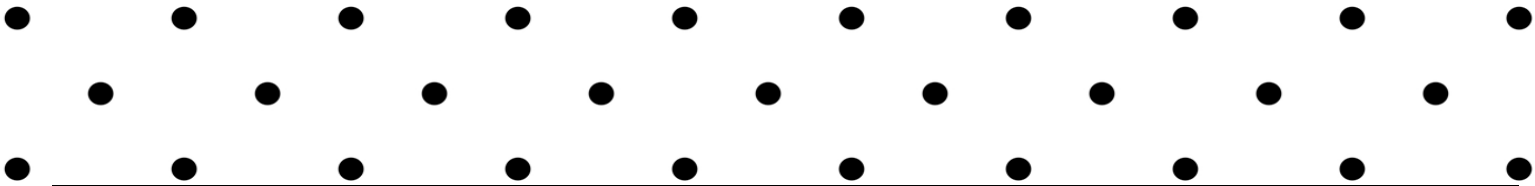
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections

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MARKETING

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CUSTOMERS

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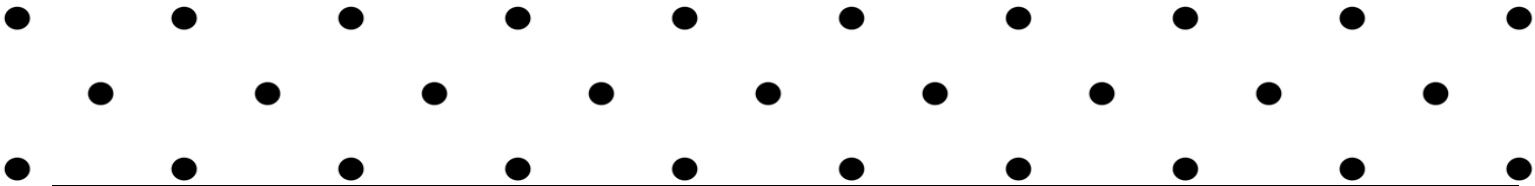
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS

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Gratitude & Reflections

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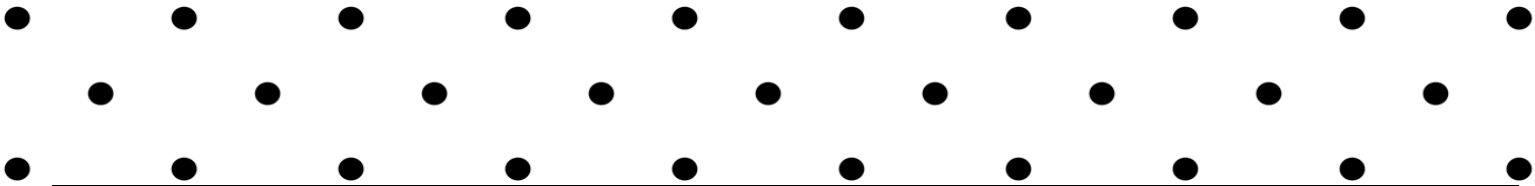
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Gratitude & Reflections

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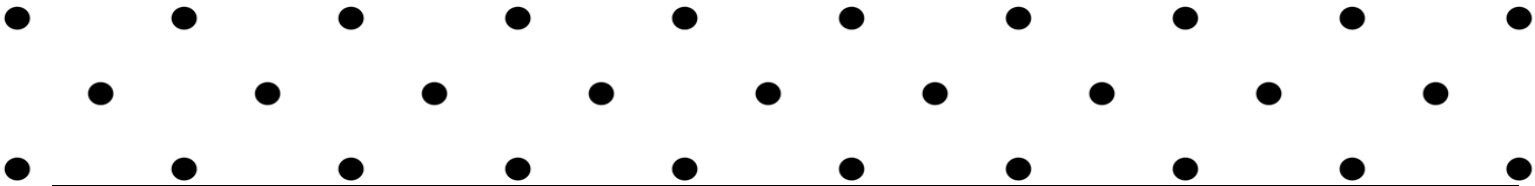
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





Notes & Ideas



HOSTS	RECRUITS	TEAM	BUSINESS
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Thursday *Friday* *Saturday* *Sunday*

			
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Gratitude & Reflections



Marketing

Do what you do so well they will want
to see it again and bring their friends.
- Walt Disney

Monthly Marketing Ideas




























































































































































Month: _____

Parties	Online
Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

WEEK 1	WEEK 2	WEEK 3	WEEK 4
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11
12	12	12	12
13	13	13	13
14	14	14	14
15	15	15	15
16	16	16	16
17	17	17	17
18	18	18	18
19	19	19	19
20	20	20	20
21	21	21	21
22	22	22	22
23	23	23	23
24	24	24	24
25	25	25	25
RESULTS	RESULTS	RESULTS	RESULTS
_____ No's	_____ No's	_____ No's	_____ No's
_____ Bookings	_____ Bookings	_____ Bookings	_____ Bookings
_____ Recruits	_____ Recruits	_____ Recruits	_____ Recruits
_____ Orders	_____ Orders	_____ Orders	_____ Orders
_____	_____	_____	_____

Social Media planner for:

Day	Post Ideas	Scheduled
1		    
2		    
3		    
4		    
5		    
6		    
7		    
8		    
9		    
10		    
11		    
12		    
13		    
14		    
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25		    
26		    
27		    
28		    
29		    
30		    
31		    

Monthly Blog Post Planner

Post Date: _____

Post Title: _____

Product(s) to Feature: _____

Images / Video to create: _____

Supplies needed: _____

Notes & Ideas: _____

Publishing Checklist

- Spelling & grammar correct
- Headings and paragraphs correct
- All links working & marked properly
- Tags & categories selected/added
- SEO keywords and phrases added
- Images aligned correctly
- Image title and alt set
- Image credit given (if not your own)
- Featured image set
- Post scheduled to social media

Post Date: _____

Post Title: _____

Product(s) to Feature: _____

Images / Video to create: _____

Supplies needed: _____

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Monthly Marketing Ideas




























































































































































Month: _____

Parties	Online
Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

WEEK 1	WEEK 2	WEEK 3	WEEK 4
1	1	1	1
2	2	2	2
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16	16	16	16
17	17	17	17
18	18	18	18
19	19	19	19
20	20	20	20
21	21	21	21
22	22	22	22
23	23	23	23
24	24	24	24
25	25	25	25
RESULTS	RESULTS	RESULTS	RESULTS
_____ No's	_____ No's	_____ No's	_____ No's
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_____ Recruits	_____ Recruits	_____ Recruits	_____ Recruits
_____ Orders	_____ Orders	_____ Orders	_____ Orders
_____	_____	_____	_____

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Day	Post Ideas	Scheduled
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2		    
3		    
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Post Title: _____

Product(s) to Feature: _____

Images / Video to create: _____

Supplies needed: _____

Notes & Ideas: _____

Publishing Checklist

- Spelling & grammar correct
- Headings and paragraphs correct
- All links working & marked properly
- Tags & categories selected/added
- SEO keywords and phrases added
- Images aligned correctly
- Image title and alt set
- Image credit given (if not your own)
- Featured image set
- Post scheduled to social media

Monthly Marketing Ideas




























































































































































Month: _____

Parties	Online
Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

WEEK 1	WEEK 2	WEEK 3	WEEK 4
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11
12	12	12	12
13	13	13	13
14	14	14	14
15	15	15	15
16	16	16	16
17	17	17	17
18	18	18	18
19	19	19	19
20	20	20	20
21	21	21	21
22	22	22	22
23	23	23	23
24	24	24	24
25	25	25	25
RESULTS	RESULTS	RESULTS	RESULTS
_____ No's	_____ No's	_____ No's	_____ No's
_____ Bookings	_____ Bookings	_____ Bookings	_____ Bookings
_____ Recruits	_____ Recruits	_____ Recruits	_____ Recruits
_____ Orders	_____ Orders	_____ Orders	_____ Orders
_____	_____	_____	_____

Social Media planner for:

Day	Post Ideas	Scheduled
1		    
2		    
3		    
4		    
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6		    
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8		    
9		    
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29		    
30		    
31		    

Monthly Blog Post Planner

Post Date: _____

Post Title: _____

Product(s) to Feature: _____

Images / Video to create: _____

Supplies needed: _____

Notes & Ideas: _____

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Monthly Marketing Ideas




























































































































































Month: _____

Parties	Online
Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

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2	2	2	2
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14	14	14	14
15	15	15	15
16	16	16	16
17	17	17	17
18	18	18	18
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_____ Bookings	_____ Bookings	_____ Bookings	_____ Bookings
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_____ Orders	_____ Orders	_____ Orders	_____ Orders
_____	_____	_____	_____

Social Media planner for:

Day	Post Ideas	Scheduled
1		    
2		    
3		    
4		    
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26		    
27		    
28		    
29		    
30		    
31		    

Monthly Blog Post Planner

Post Date: _____

Post Title: _____

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Images / Video to create: _____

Supplies needed: _____

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Monthly Marketing Ideas




























































































































































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_____	_____	_____	_____

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1		    
2		    
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Monthly Blog Post Planner

Post Date: _____

Post Title: _____

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Monthly Marketing Ideas




























































































































































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Monthly Contacts

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_____ Orders	_____ Orders	_____ Orders	_____ Orders
_____	_____	_____	_____

Social Media planner for:

Day	Post Ideas	Scheduled
1		    
2		    
3		    
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30		    
31		    

Monthly Blog Post Planner

Post Date: _____

Post Title: _____

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Monthly Marketing Ideas




























































































































































Month: _____

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Recruiting	Customers
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1	1	1	1
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14	14	14	14
15	15	15	15
16	16	16	16
17	17	17	17
18	18	18	18
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Day	Post Ideas	Scheduled
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Monthly Marketing Ideas




























































































































































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Recruiting	Customers
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WEEK 1	WEEK 2	WEEK 3	WEEK 4
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Social Media planner for:

Day	Post Ideas	Scheduled
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Monthly Marketing Ideas




























































































































































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15	15	15	15
16	16	16	16
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31		    

Monthly Blog Post Planner

Post Date: _____

Post Title: _____

Product(s) to Feature: _____

Images / Video to create: _____

Supplies needed: _____

Notes & Ideas: _____

Publishing Checklist

- Spelling & grammar correct
- Headings and paragraphs correct
- All links working & marked properly
- Tags & categories selected/added
- SEO keywords and phrases added
- Images aligned correctly
- Image title and alt set
- Image credit given (if not your own)
- Featured image set
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Monthly Marketing Ideas




























































































































































Month: _____

Parties	Online
Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

WEEK 1	WEEK 2	WEEK 3	WEEK 4
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
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16	16	16	16
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18	18	18	18
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22	22	22	22
23	23	23	23
24	24	24	24
25	25	25	25
RESULTS	RESULTS	RESULTS	RESULTS
_____ No's	_____ No's	_____ No's	_____ No's
_____ Bookings	_____ Bookings	_____ Bookings	_____ Bookings
_____ Recruits	_____ Recruits	_____ Recruits	_____ Recruits
_____ Orders	_____ Orders	_____ Orders	_____ Orders
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Social Media planner for:

Day	Post Ideas	Scheduled
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Monthly Marketing Ideas




























































































































































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Recruiting	Customers
Team	VIP Group
Events	Out & About / Other

Monthly Contacts

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_____ Recruits	_____ Recruits	_____ Recruits	_____ Recruits
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Day	Post Ideas	Scheduled
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Monthly Marketing Ideas




























































































































































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Team	VIP Group
Events	Out & About / Other

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Catalog Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Catalog Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Catalog Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Catalog Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up

Sample Requests

Date	Name	Address	Email / Phone	Sent	Follow up



Customers

If you work just for the money, you'll never make it, but if you love what you do and always put the customer first, success will be yours. - Roy Kroc

Phone Call Log

Date	Name	Phone #	Notes	X



Phone Call Log

Date	Name	Phone #	Notes	X

Phone Call Log

Date	Name	Phone #	Notes	X

Phone Call Log

Date	Name	Phone #	Notes	X

Phone Call Log

Date	Name	Phone #	Notes	X

Phone Call Log

Date	Name	Phone #	Notes	X

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

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Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

Follow Up Contact List

Bookings & Hosts	Recruits & Team Members	Customers & Orders	Other

New Contacts

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Address: _____

Party Opp. Fund. Order

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Address: _____

Party Opp. Fund. Order

City/ST/Zip: _____

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Customer Information

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Phone #: C: _____ H: _____ W: _____ Time Zone: _____

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Customer Information

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Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____ Customer ID #: _____

Address: _____

Met at / Referred by: _____

Interested in: <input type="radio"/> Hosting a Party <input type="radio"/> Business Opportunity <input type="radio"/> Fundraising <input type="radio"/> Ordering <input type="radio"/> Other:	Info. Given/Sent: <input type="radio"/> Party Packet <input type="radio"/> Recruiting Packet <input type="radio"/> Fundraiser Packet <input type="radio"/> Catalog / Brochure <input type="radio"/> Product Sample	Wish list:
---	--	-------------------

Follow Up:	Date:	Type:	Result/Notes:
<input type="radio"/> 24 Hours	_____	_____	_____
<input type="radio"/> 72 Hour	_____	_____	_____
<input type="radio"/> 1 Week	_____	_____	_____
<input type="radio"/> 2 Weeks	_____	_____	_____
<input type="radio"/> 1 Month	_____	_____	_____
<input type="radio"/> 2 Months	_____	_____	_____

Added to Monthly Newsletter List Invited to FB Page / Group Added to Customer Database

Notes:

Order History

Customer: _____

Date	Item #	Item Name	Description	Conf. & Thanks	Re-order

Customer Information

Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____ Customer ID #: _____

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Interested in: <input type="radio"/> Hosting a Party <input type="radio"/> Business Opportunity <input type="radio"/> Fundraising <input type="radio"/> Ordering <input type="radio"/> Other:	Info. Given/Sent: <input type="radio"/> Party Packet <input type="radio"/> Recruiting Packet <input type="radio"/> Fundraiser Packet <input type="radio"/> Catalog / Brochure <input type="radio"/> Product Sample	Wish list:
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Follow Up:	Date:	Type:	Result/Notes:
<input type="radio"/> 24 Hours	_____	_____	_____
<input type="radio"/> 72 Hour	_____	_____	_____
<input type="radio"/> 1 Week	_____	_____	_____
<input type="radio"/> 2 Weeks	_____	_____	_____
<input type="radio"/> 1 Month	_____	_____	_____
<input type="radio"/> 2 Months	_____	_____	_____

Added to Monthly Newsletter List Invited to FB Page / Group Added to Customer Database

Notes:

Order History

Customer: _____

Date	Item #	Item Name	Description	Conf. & Thanks	Re-order

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Shipped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Shipped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Shipped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Shipped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Order Tracking

Date	Order #	Customer or Host Name	Contact Info	Submitted	Ship -ped	Follow up

Gift Certificates

Purch. Date	Purchaser & Contact Info	Recipient & Contact Info	\$	Exp. Date	Redeemed

Gift Certificates

Purch. Date	Purchaser & Contact Info	Recipient & Contact Info	\$	Exp. Date	Redeemed

Gift Certificates

Purch. Date	Purchaser & Contact Info	Recipient & Contact Info	\$	Exp. Date	Redeemed

Gift Certificates

Purch. Date	Purchaser & Contact Info	Recipient & Contact Info	\$	Exp. Date	Redeemed

Replacements / Missing Items

Date	Name	Phone #	Items	X



parties

Life might not be the party we hoped for,
but while we are here we might as well dance!

-Anonymous

Host Connections

Host Name	Party Date(s) & Time	Host Packet Sent	Initial Coaching Session	Set up FB Event	Pre-party Follow up #1	Schedule FB Event Posts	Pre-party Follow up #2	Pre-party Follow up #3	Party Close out with Host	Party Order Submitted /Confirm	Orders Delivered Follow up	After Party Follow up / Thank Host

Host Connections

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Booking Calendar

Month: _____

Notes:

Month: _____

Notes:

Booking Calendar

Month: _____

Notes:

Month: _____

Notes:

Booking Calendar

Month: _____

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Booking Calendar

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Month: _____

Notes:



Theme party planner

Theme/Name: _____

Products to Feature / Display:

Theme Specials / Bundles:

Decorations / Supplies Needed:

Games to Play:

Images to Create:

Videos to Create:

Party Outline/Flow:

Welcome / Introductions / Icebreaker Game:

Product Demo:

Host Booking Demo:

Recruiting Demo:

Wrap Up:

Other:



Theme Party planner

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Other:



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Games to Play:

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Product Demo:

Host Booking Demo:

Recruiting Demo:

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Theme Specials / Bundles:

Decorations / Supplies Needed:

Games to Play:

Images to Create:

Videos to Create:

Party Outline/Flow:

Welcome / Introductions / Icebreaker Game:

Product Demo:

Host Booking Demo:

Recruiting Demo:

Wrap Up:

Other:

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Host Coaching Checklist

First 72 Hours After Booking:

- Deliver or Mail Packet
- Explain Party Success Tips & Host Rewards
- Discuss Party Theme & Refreshments
- Mail Thank You for Dating Postcard

2-3 Weeks Before the Party:

- Confirm Party Details
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Week of the Party:

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- Send Thank You Card Day after the Party
- Close Out Day: _____
- Confirm Order Placed & Remind of est. delivery
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- Follow up 3 Days after Delivery with Host
- Follow up with Guests 1 Week After

Notes:

Party Summary

Party Totals:

Retail Party Sales: _____

Total with Tax/Shipping: _____

Host Credits Earned: _____

of Guests / # of Orders: _____ / _____

Expenses: _____ Profit: _____

Bookings & Party Leads:

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Host Coaching Checklist

First 72 Hours After Booking:

- Deliver or Mail Packet
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Total with Tax/Shipping: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

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Total with Tax/Shipping: _____

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of Guests / # of Orders: _____ / _____

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Host Coaching Checklist

First 72 Hours After Booking:

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of Guests / # of Orders: _____ / _____

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
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Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Name: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

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Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

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TOTAL OUTSIDE ORDERS							

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Retail Party Sales: _____
Total with Tax/Shipping: _____
Host Credits Earned: _____
of Guests / # of Orders: _____ / _____
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Bookings & Party Leads:

Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Phone #: C: _____ H: _____ W: _____ Time Zone: _____

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Party Summary

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Total with Tax/Shipping: _____

Host Credits Earned: _____

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Date: _____ Type: _____ Held: _____

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Host Coaching Checklist

First 72 Hours After Booking:

- Deliver or Mail Packet
- Explain Party Success Tips & Host Rewards
- Discuss Party Theme & Refreshments
- Mail Thank You for Dating Postcard

2-3 Weeks Before the Party:

- Confirm Party Details
- Confirm / Remind about Guest List
- Send Save the Date Postcards or Emails
- Set up Online Party Link / Facebook Event

Week of the Party:

- Touch base with Host 7 Days Before
- Touch base with Host 2 Days Before

After the Party:

- Send Thank You Card Day after the Party
- Close Out Day: _____
- Confirm Order Placed & Remind of est. delivery
- Contact when order ships / Sched. delivery
- Add Guests to Customer & Newsletter List
- Follow up 3 Days after Delivery with Host
- Follow up with Guests 1 Week After

Notes:

Party Summary

Party Totals:

Retail Party Sales: _____

Total with Tax/Shipping: _____

Host Credits Earned: _____

of Guests / # of Orders: _____ / _____

Expenses: _____ Profit: _____

Bookings & Party Leads:

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

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Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
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Outside Orders		Checks		Checks pd to host	
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TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

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Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Email: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

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Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Party Orders		Credit Cards		Host Order	
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Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Host Coaching Checklist

First 72 Hours After Booking:

- Deliver or Mail Packet
- Explain Party Success Tips & Host Rewards
- Discuss Party Theme & Refreshments
- Mail Thank You for Dating Postcard

2-3 Weeks Before the Party:

- Confirm Party Details
- Confirm / Remind about Guest List
- Send Save the Date Postcards or Emails
- Set up Online Party Link / Facebook Event

Week of the Party:

- Touch base with Host 7 Days Before
- Touch base with Host 2 Days Before

After the Party:

- Send Thank You Card Day after the Party
- Close Out Day: _____
- Confirm Order Placed & Remind of est. delivery
- Contact when order ships / Sched. delivery
- Add Guests to Customer & Newsletter List
- Follow up 3 Days after Delivery with Host
- Follow up with Guests 1 Week After

Notes:

Party Summary

Party Totals:

Retail Party Sales: _____

Total with Tax/Shipping: _____

Host Credits Earned: _____

of Guests / # of Orders: _____ / _____

Expenses: _____ Profit: _____

Bookings & Party Leads:

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Party Planner

Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

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Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

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TOTAL AT THE PARTY ORDERS							

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Party Day & Date: _____ Time: _____ Type: •Home •Catalog •Online

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Expenses: _____ Profit: _____

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Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____
Name: _____
Date: _____ Type: _____ Held: _____

Recruits & Recruit Leads:

Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____
Name: _____ Joined: _____

Party Close Out

Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

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TOTAL OUTSIDE ORDERS							

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Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

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Start Day/Date: _____ End Day/Date: _____ Live Party Day/Time: _____

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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

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Online Orders		Cash		Outside Orders	
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Online party planner

Start Day/Date: _____ End Day/Date: _____ Live Party Day/Time: _____

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

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Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Online party planner

Start Day/Date: _____ End Day/Date: _____ Live Party Day/Time: _____

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Party Planning

First 72 hours after booking:

- Email Packet / _____ Mail Packet & Catalogs
- Host Coaching Session _____ @ _____
- Mail Thank You for Dating Postcard
- Follow up weekly to confirm & touch base

Day before party:

- Set up online shopping link
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Kick off day:

- Post RSVP Drawing Image / Post
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Leading up the live party:

- Daily Posts Scheduled / Planned
- Check Daily for ?'s & comments + Post Thanks

Live party day:

- Reminder Posts Scheduled
- Live Party & After Posts Scheduled
- FB Live / Live Game

Close out day:

- Reminder Posts Scheduled

After the party:

- Add Guests to Customer & Newsletter List
- Follow up 3 Days after Delivery with Host
- Follow up with Guests 1 Week After

Party Summary

Party totals:

Retail Party Sales: _____

Total with Tax/Shipping: _____

Host Credits Earned: _____

of Guests / # of Orders: _____ / _____

Expenses: _____ Profit: _____

Bookings & party leads:

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

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Date: _____ Type: _____ Held: _____

Name: _____

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Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

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Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
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Name: _____ Joined: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

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Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

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Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

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Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
TOTAL WEBSITE ORDERS							

Outside Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
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Host: _____ Party Date: _____

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TOTAL OUTSIDE ORDERS							

At the Party Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Payment Method	Paid to Host	Paid CC or to Me
TOTAL AT THE PARTY ORDERS							

Totals

Party Retail	\$	\$ Due from Cust.	\$	\$ Due from Host	\$
Online Orders		Cash		Outside Orders	
Outside Orders		Checks		Checks pd to host	
Party Orders		Credit Cards		Host Order	
TOTAL Retail:		Total Customer \$:		Total \$ Host Owes:	

Online party planner

Start Day/Date: _____ End Day/Date: _____ Live Party Day/Time: _____

Host Name: _____ Pref. Contact: •Phone •Email •Text •FB

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Email: _____

Address: _____

Party Planning

First 72 hours after booking:

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Close out day:

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After the party:

- Add Guests to Customer & Newsletter List
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Party Summary

Party totals:

Retail Party Sales: _____

Total with Tax/Shipping: _____

Host Credits Earned: _____

of Guests / # of Orders: _____ / _____

Expenses: _____ Profit: _____

Bookings & party leads:

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

Website Orders

Customer Name	Order Retail	Shipping	Sales Tax	Total \$ Due	Paid		
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Date: _____ Type: _____ Held: _____

Name: _____

Date: _____ Type: _____ Held: _____

Recruits & recruit leads

Name: _____ Joined: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

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Recruits & recruit leads

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Name: _____ Joined: _____

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Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

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Host: _____ Party Date: _____

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Recruits & recruit leads

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Name: _____ Joined: _____

Notes:

Party Close Out

Host: _____ Party Date: _____

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Vendor Events

Succeeding in business is all
about making connections.
- Sir Richard Branson

Upcoming Vendor Events

Month/Date	Event Name	Contact Info / Application	Fee	Paid	Conf

Upcoming Vendor Events

Month/Date	Event Name	Contact Info / Application	Fee	Paid	Conf

Vendor Event planner

Event Name: _____ Date: _____ Times: _____

Location: _____

Booth Fee: _____ Website: _____

Contact Name: _____ Phone #: _____

Email: _____

Event Preparation Checklist

- Booth Fee Mailed / Paid
 - Supplies / Sales Aids Ordered / On Hand
 - Vendor Event Bag Packed
 - Sales Fliers
 - Catalogs
 - Clipboards
 - Calculator
 - Cash Change
 - Signs / Banners
 - Party Packets
 - Bonus Gifts
 - Tablecloths
 - Pens, Markers
 - Success Planner
 - _____
 - Order Forms
 - Drawing Slips
 - Business Cards
 - Card Reader
 - Nametag
 - Bags for Purchases
 - Recruit Packets
 - Fundraiser Packets
 - Office Supply Bag
 - Extra Price Stickers
 - Device Chargers
 - _____
- Product / Demo / Display Items
 - Cash & Carry Items
 - Tables, Tent & Chair (If not provided)
 - _____
 - _____
 - _____

Event Follow Up Checklist

- Enter new leads into customer database
- Follow Up Phone Calls with H.O.T. Leads
- Contact Prize Winner(s)
- Thank you email to all leads
- Thank you note to event coordinator
- Get application / date for next year's event

Event Summary

Catalog Orders Placed:

Total Retail: _____

Total with Tax/Shipping: _____

Profit Earned: _____

Cash and Carry Sold:

Total Retail: _____

Total with Tax/Shipping: _____

Profit Earned: _____

Total # of Leads:

New Contacts: _____

Parties: _____

Recruits: _____

Fundraiser: _____

Notes:

Vendor Event planner

Event Name: _____ Date: _____ Times: _____

Location: _____

Booth Fee: _____ Website: _____

Contact Name: _____ Phone #: _____

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 - Supplies / Sales Aids Ordered / On Hand
 - Vendor Event Bag Packed
 - Sales Fliers
 - Catalogs
 - Clipboards
 - Calculator
 - Cash Change
 - Signs / Banners
 - Party Packets
 - Bonus Gifts
 - Tablecloths
 - Pens, Markers
 - Success Planner
 - _____
 - Order Forms
 - Drawing Slips
 - Business Cards
 - Card Reader
 - Nametag
 - Bags for Purchases
 - Recruit Packets
 - Fundraiser Packets
 - Office Supply Bag
 - Extra Price Stickers
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- Product / Demo / Display Items
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 - Tables, Tent & Chair (If not provided)
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Contact Name: _____ Phone #: _____

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Fundraiser: _____

Notes:

Fundraisers

We make a living by what we get,
we make a life by what we give.
-Sir Winston Churchill

Fundraiser planner

Group / Organization: _____

Fundraiser Start Date: _____ End Date: _____ Goal: _____

Address: _____

Contact Name: _____ Title: _____

Phone #: _____ Best time to contact: _____

Email: _____

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Notes & Reminders:



Recruiting

Spread love wherever you go. Let no one
ever come to you without leaving happier..

- Mother Teresa

Recruit Lead Follow Up

Name	Contact Info	Packet	1 on 1 Interview	Opp. Event	Follow Up 1	Follow Up 2	Drip List	Notes

New Team Member Successful Start

Name: _____ Recruiter: _____

Join Date: _____ Birthday: _____ Email: _____

Phone #: C: _____ H: _____ W: _____ Time Zone: _____

Address: _____

30 Days: _____ 60 Days: _____ 90 Days: _____ 120 Days: _____ Pref. Contact: •Phone •Email •Text •FB

Successful Start Coaching Checklist

- Welcome Email Sent
- Help Set Up Website & Go Over Basics
- Register for Email Training Series
- Set Date for 1st Party: _____ @ _____
- 48 Hour Follow Up
- Schedule Business Planning Session _____ @ _____
- Send Welcome Postcard / Packet
- Remind to Attend New Cons. Success Class
- Assist with Kick Off Party

Weekly Connect & Goal Check

Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6
Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12

Achievements & Prizes Earned

Notes:

Business Planning Session

Date: _____ Time: _____

Family, Work & Hobbies:

Personality Type:

Reason for Joining:

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Strengths:

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Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12

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Business Focus:

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3 Mo. Goals: _____

6 Mo. Goals: _____

1 Year Goals: _____

Leadership Thoughts:

Learning Style:

Strengths:

Potential Obstacles:

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Join Date: _____ Birthday: _____ Email: _____

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Potential Obstacles:

Plan of Action:



Team Leadership

The role of a great leader is not to give
greatness to others but to help them extract
the greatness they already have
inside them. - J. Buchan

Team Member Information

Name	Bday	Ann.	Address	Phone	Email

Team Member Information

Name	Bday	Ann.	Address	Phone	Email

Team Member Connections List

Name	Contact Method	Notes	Date	Follow Up

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Name	Contact Method	Notes	Date	Follow Up

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Weekly Team Training Plan

1	14	27	40
2	15	28	41
3	16	29	42
4	17	30	43
5	18	31	44
6	19	32	45
7	20	33	46
8	21	34	47
9	22	35	48
10	23	36	49
11	24	37	50
12	25	38	51
13	26	39	52

Team Prizes

Date	Name	Prize(s)	Achievement	Sent

Team Prizes

Date	Name	Prize(s)	Achievement	Sent



Team Prizes

Date	Name	Prize(s)	Achievement	Sent



Team Meeting Ideas

Month / Date	Theme / Focus	Notes

Team Meeting planner

Meeting Date: _____ Time: _____ Place: _____

Theme/Focus: _____

Assistants & Guest Trainers:

Name: _____ Help with/Train on: _____

Name: _____ Help with/Train on: _____

Name: _____ Help with/Train on: _____

Name: _____ Help with/Train on: _____

Welcome Activity:

Recognition:

Training:

Group Activity:

Call to Action:

Supplies to Bring:

Products & Materials:

Follow Up Notes:

Team Meeting planner

Meeting Date: _____ Time: _____ Place: _____

Theme/Focus: _____

Assistants & Guest Trainers:

Name: _____ Help with/Train on: _____

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Business

Organization isn't about perfection; it's about efficiency, reducing stress and clutter, saving time and money and improving your overall quality of life. -Christine Scalise

Business Information

Company Name: _____ Join Date: _____

Consultant Id #: _____

Back Office Link: _____

Username: _____ Password: _____

My Consultant Website: _____

Sponsor's Name: _____ Phone #: _____

Sponsor's Email: _____

Leader's Name: _____ Phone #: _____

Leader's Email: _____

Company Website: _____ Phone #: _____

Support Email: _____

Customer Service Phone #: _____

Other Important Information:

Business Growth

	January	February	March	April	May	June
Profit Earned						
Personal Sales						
Personal Recruits						
Personal Team Count						
Level						
Team Sales						
Team Recruits						
Team Count						
Leader Count						
Parties Held						
Contacts Made						
I feel like I did great with...						
I could have done better in...						
I am most proud of...						
Next month I will focus on....						

Business Growth

	July	August	September	October	November	December
Profit Earned						
Personal Sales						
Personal Recruits						
Personal Team Count						
Level						
Team Sales						
Team Recruits						
Team Count						
Leader Count						
Parties Held						
Contacts Made						
I feel like I did great with...						
I could have done better in...						
I am most proud of...						
Next month I will focus on....						

Company Incentives / Prizes

Incentive/Prize	Dates to Earn	Qualifications	Action Plan to Achieve	Earned

Company Incentives / Prizes

Incentive/Prize	Dates to Earn	Qualifications	Action Plan to Achieve	Earned

Company Incentives / Prizes

Incentive/Prize	Dates to Earn	Qualifications	Action Plan to Achieve	Earned

Company Incentives / Prizes

Incentive/Prize	Dates to Earn	Qualifications	Action Plan to Achieve	Earned

Business Income & Expenses

Month: _____

Income

Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses

Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals

Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income

Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses

Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals

Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Business Income & Expenses

Month: _____

Income				
Income Source	Date	Amount	How Received	Notes
TOTAL INCOME:				

Expenses					
Expense	Date	Category	\$ Amount	Payment Method	Notes
TOTAL EXPENSES:					

Totals		
Income:	Expenses:	Profit:

Gifts, Giveaways & Donations

Date	For	Product	Value / Cost	Winner & Contact Info	Sent

Product Swaps

Date	Person's Name	Contact Info	\$	Items Swapped	Sent	Rec'd

Product Swaps

Date	Person's Name	Contact Info	\$	Items Swapped	Sent	Rec'd

Training

Every expert was once a beginner,
so learn everything and start now.
-Unknown

