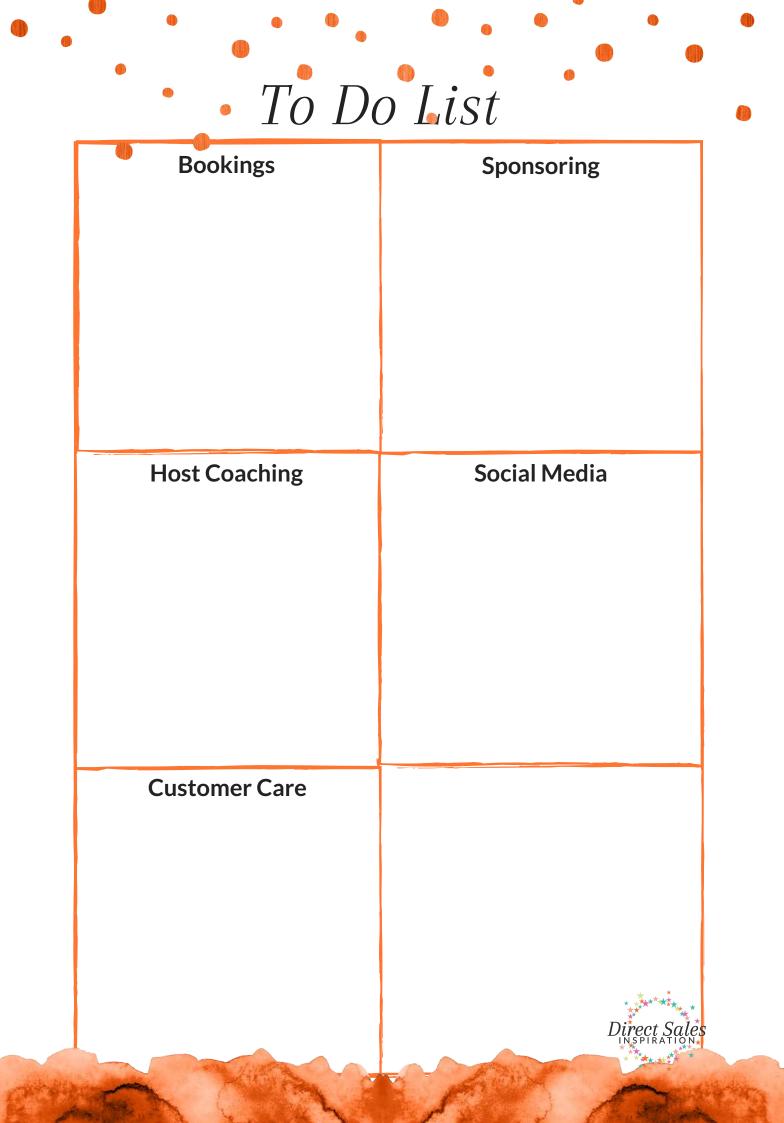
To Do List Bookings Sponsoring Host Coaching **Social Media Customer Care**



To Do List Bookings Sponsoring **Host Coaching Social Media Customer Care**

Bookings	O LiSt Sponsoring
Host Coaching	Social Media
Customer Care	
Customer Care	
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Vendor event planner

Event Name:	Date(s): Times:
Location:	
Booth Fee: Website:	
Contact Name:	Phone #:
Email:	Other:
event preparation checklist	event follow up checklist
Booth Fee Mailed / Paid	Enter new leads into customer database
Supplies / Sales Aids Ordered / On Hand	Follow Up Phone Calls with H.O.T. Leads
Vendor Event Bag Packed	Contact Prize Winner(s)
Sales Fliers Order Forms	Thank you email to all leads
Catalogs Drawing Slips	Thank you note to event coordinator
Clipboards Dusiness Cards	Get application / date for next year's event
Calculator Card Reader	event summary
Cash Change Nametag Signs / Banners Bags for Purchases	Catalog Orders Placed:
Party Packets Recruit Packets Bonus Gifts Fundraiser Packets Tablecloths Office Supply Bag	Total with Tax/Shipping: Profit Earned:
Pens, Markers Extra Price Stickers	Cash and Carry Sold:
Success Planner Device Chargers	Total Retail:
Ō Ŏ	Total with Tax/Shipping:
Product / Demo / Display Items	Profit Earned:
Cash & Carry Items Tables, Tent & Chair (If not provided)	Total # of Leads: New Contacts: Parties:
Q	Recruits:
\bigcirc	Fundraiser:

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Notes

Home Office Organization Challenge

O Top of Desk	Bookcase / Shelves	Business Supplies
Under Desk	Closet / Storage Area	O Inventory
O Desk Drawers	Filing Cabinet / Files	O Business Kit
O Desk Shelves	Party Bag / Supplies	Event Bag / Supplies
Books		Binders & Folders
Mobile Office	Biz Equipment / Tech	Office Floor
	O Tote Bag / Laptop Bag	O Windows, Window Sills
Containers	O Baskets & Bins	🔘 Dust, Vacuum & Clean
O	O	0
0	0	0

STEP 1: SORT & DECLUTTER

Begin clearing out the areas & separate everything into keep, trash, donate, sell or belongs elsewhere. Throw away any trash or broken items.

STEP 2: ORGANIZE & CREATE A SPACE FOR EVERYTHING

Use baskets, bins, drawers, containers, shelving units, file boxes, tote bags, etc. and create a space or area for all your key items and supplies.

STEP 3: PUT IT BACK TOGETHER & DO A SECOND SORT

Put everything in it's new/updated space and do a second sort & declutter as you finish organizing.

STEP 4: REFRESH YOUR OFFICE DÉCOR

STEP 4: DUST, VACUUM, CLEAN, TAKE OUT THE TRASH & ENJOY YOUR FRESH SPACE

STEP 5: CREATE A TO FILE/PUT AWAY BIN & SCHEDULE TIME WEEKLY & / OR MONTHLY TO RE-SORT, CLEAN & ORGANIZE YOUR OFFICE SPACE TO KEEP IT IN TIP TOP SHAPE.

Important Website Information

DOMAIN INFORMATION:		
My Doman Name is:		
My Domain Registrar:		_
Domain Control Panel Login Website:		
Username:	Password:	
Expire / Renewal Date: Au	to-Renew Set Up: Y / N Annual Cost:	》
HOSTING INFORMATION:		
My Web Hosting Company is:		
Tech Support Phone #:	Email:	_
Username:	Password:	_
Monthly/Annual Fee: Auto-E	Draft: Y / N Payment Due Date:	
Login Link for my Control Panel / FTP (CPane	el):	
Server / Host Name:		
Username:	Password:	_
E-MAIL INFORMATION:		
Webmail Login Link:		
Username:	Password:	
	SMTP:	
WORDPRESS OR BLOGGER DASHBOARD II	NFORMATION:	- 0
Link to Login to my Admin Dashboard:		
Username:	Password:	_
WEBSITE DESIGNER'S INFORMATION:		
Company Name:	Contact Name:	
Email:	Website:	
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Attraction Marketing PLANNER

WEEKLY FOCUS

10 Lifestyle Posts	
4 Business Seed Posts	
1 Selling Post	
ΝΟΤΕՏ	LESS REGULAR TASKS
• Are you positive in all your posts?	Check Your Page "Intro"
Are you inspirational?Are you educational?	Check Your Page "Story"
 Do your pictures show an attractive lifestyle? 	Update Profile Picture
 Do you answer questions and comments quickly? 	Update Cover Image
 Do you show where you get YOUR 	Post Video / Live Content
inspiration from?Are you speaking your truth?	Review of Successful Posts
 Have you defined your own mission and put this in the Intro section? 	Post Quiz or "this/that" Post
	Show how you celebrate holidays/wins
	Post relevant content from others
••••••	Monitor "competition"
•••••	

Business Growth

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPT	OCTOBER	NOV	DEC
PROFIT EARNED												
PERSONAL SALES												
PERSONAL RECRUITMENT												
PERSONAL TEAM COUNT												
LEVEL												
TEAM SALES												
TEAM RECRUITS												
TEAM COUNT												
PARTIES HELD												
CONTACTS MADE												
I FEEL I DID GREAT WITH												
I COULD HAVE DONE BETTER												
I AM MOST PROUD OF												
NEXT MONTH I WILL FOCUS ON												

Catalog Requests

		FOLLOW UP
	Image: Section of the section of th	Image: section of the section of th

DATE	NAME	ADDRESS	EMAIL	SENT	FOLLOW UP

Company Incentives

INCENTIVE/PRIZE	DATES TO EARN	QUALIFICATIONS	ACTION PLAN TO ACHEIVE	EARNED

	DATES TO EADN			
INCENTIVE/PRIZE	DATES TO EARN	QUALIFICATIONS	ACTION PLAN TO ACHEIVE	EARNED

Gift Certificates

PURCHASE DATE	PURCHASER & INFO	RECIPIENT	\$ EXPIR. DATE	REDEEMED

PURCHASE DATE	PURCHASER & INFO	RECIPIENT	\$ EXPIR. DATE	REDEEMED

Goal Planning

My Big Hairy Goals

Be specific, make it measurable & choose attainable but bold goals you want to achieve.

My smaller goals for the next 3 months:

Sales:	
Recruits:	
How many parties do I need?	

3 Actions I'll take this week towards my goals:



www.directsalesinspiration.com

Giveaways & Donations

DATE	FOR	PRODUCT	COST	WINNER & INFO	SENT

DATE	FOR	PRODUCT	COST	WINNER & INFO	SENT

Host Connections

HOST NAME	PARTY DATE & TIME	HOST PACKET SENT	SET UP FB EVENT	PRE-PARTY FOLLOW UP	SCHED. FB EVENT POSTS	FOLLOW UP #2	FOLLOW UP #3	PARTY CLOSE OUT	ORDERS DELIVERED	AFTER PARTY FOLLOWUP THANK YOU

MONTHLY ACTION PLAN

MONTH:

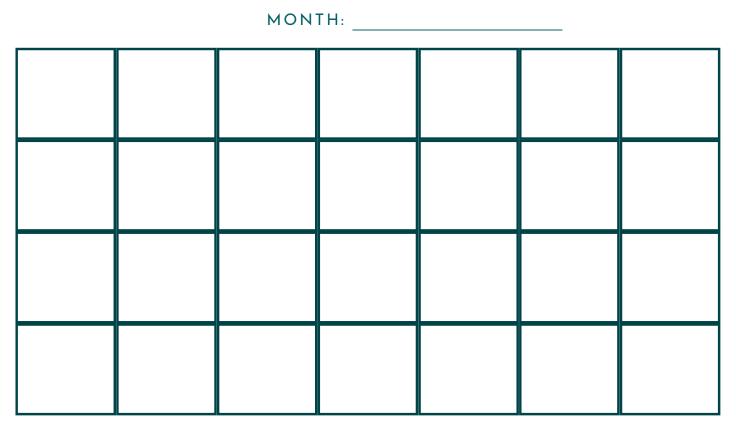
GOALS	BUSINESS TASKS	MARKETING
INCOME	BIZ. HOURS SCHEDULED	SOCIAL MEDIA
PARTIES	BIZ. SUPPLIES ORDERED BIZ. MATERIALS LABELED PARTY FOLDERS & DEMO KIT UPDATED HOST, RECRUIT, FUND. PACKETS UPDATED CUSTOMER GOODIE BAGS PREPPED	 PRODUCTS TO FEATURE: HOLIDAYS/EVENTS/ SEASONAL IDEAS:
TEAM	 TEAM PRIZES READY/MAILED THANK YOU HOSTESS READY/MAILED MONTHLY INCOME/EXPENSES RECORDED OFFICE & EMAIL PURGE 	• LIFESTYLE POSTS:
OTHER	\bigcirc	• OTHER:
TRAINING & MEETING	S	
DATE TIME	LOCATION/LINK	POSTS SCHEDULED: WK1WK2WK3WK4
		 NEWSLETTER/ BLOG POST(S): PRODUCTS TO FEATURE:
NOTES:		TIPS OR IDEAS:
		SPECIAL OFFERS:
		• OTHER:
		NEWSLETTER SCHED./SENT
		BLOG POSTS PUBLISHED & PROMOTED
		VENDOR/NETWORKING EVENTS: DATE EVENT NAME
		PARTIES: DATE HOST NAME

GOALS	MARKETING	SOCIAL MEDIA /BLOG	CUSTOMERS
TO-DO LIST	MONDAY	TUESDAY	WEDNESDAY
	NOTES & IDEAS		

HOSTS	RECRUITS	TEAM	BUSINESS
THURSDAY	FRIDAY	SATURDAY	SUNDAY

GRATITUDE & REFLECTIONS

BOOKING CALENDAR



MONTH:

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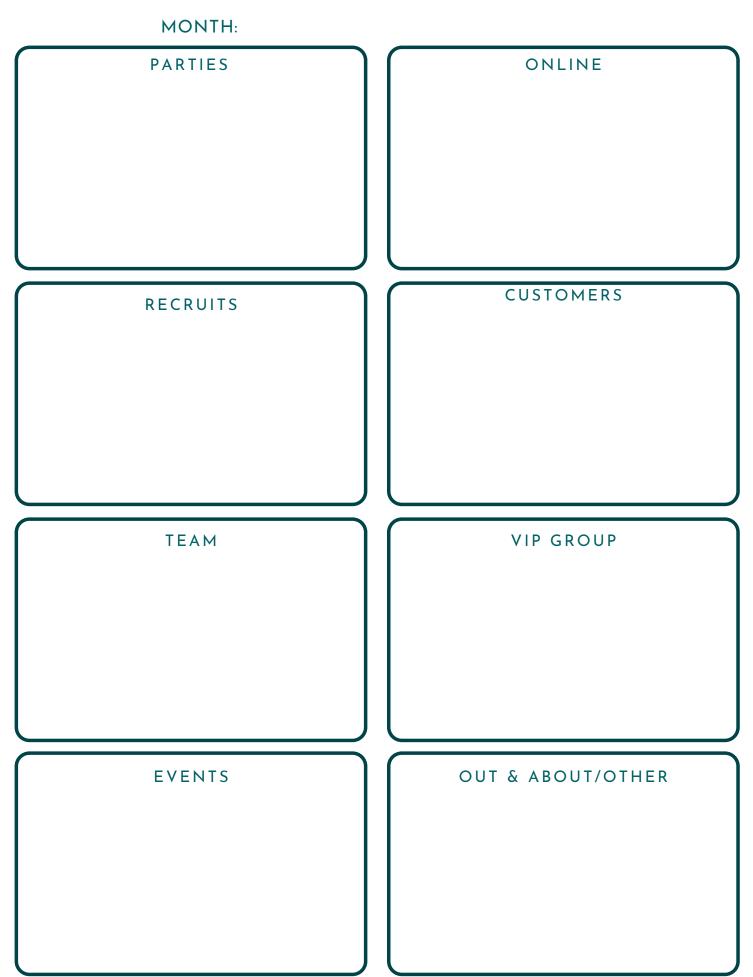
	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
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WEEK:

SOCIAL MEDIA PLANNER

DAY	POST IDEAS	SCHEDULED
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MONTHLY MARKETING IDEAS



Online Paril			
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 Checklist	Party S	unnary	
AFTER PARTY IS BOOKED / PRIOR TO THE PARTY:	PARTY TOTALS:		
Email/Msg Host Packet &/or Mail Host Packet & Catalogs	Retail Party Sales:		
Host Coaching Session or Follow Up Message / Video	Total with Tax/Shipping:		
Mail Thanks for Hosting Postcard if not mailing a packet	Host Credits Earned:		
Connect with host 2 weeks, 1 week & 3 days before party	# of Guests / # of Orders: _	/	
DAY BEFORE PARTY KICK OFF:	Expenses:	_ Profit:	
Set up online shopping link Set up Facebook Group, Header + Welcome Posts Invite Host to the FB Group	BOOKINGS & PARTY LEAD Name: Type		
Remind Host to Share the Group Link with Friends	Name:		
KICK OFF DAY: Post RSVP Drawing Prize Game / Do a FB Live Intro	Date: Type	e: Held: _	
Welcome the Guests + Post How Party Works Reminders	Date: Type	»: Held:_	
LEADING UP THE LIVE PARTY: Daily Posts Scheduled / Planned Check Daily for ?'s & comments + Post Thanks	Name: Date: Type		
IVE PARTY DAY:	RECRUITS & RECRUIT LEAD	S	
Reminder Posts Scheduled	Name:	Joined	:
Live Party & After Posts Scheduled	Name:	Joined	:
FB Live / Live Game Planned / Prepared / Scheduled	Name:	Joined	:
CLOSE OUT DAY:	Name:	Joined	:
Reminder Posts Scheduled / Live Video with Reminders AFTER THE PARTY: Add Guests to Customer & Newsletter List	PRIZES TO SEND: Name:	Prize:	
	Name:	Prize:	

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Team Information

NAME	BIRTHDAY	ADDRESS	EMAIL	PHONE

NAME	BIRTHDAY	ADDRESS	EMAIL	PHONE

Team Meeting Ideas

MONTH/DATE	THEME/FOCUS	NOTES

MONTH/DATE	THEME/FOCUS	NOTES

Team Member Connections

CONTACT METHOD	NOTES	DATE	FOLLOW UP
	CONTACT METHOD	CONTACT METHOD NOTES Image:	CONTACT METHOD NOTES DATE Image:

Team Member Onboarding

	•	1	· ·		-	-		(6	-	
NAME	DATE JOINED	SET UP ACCT. HELP GET STARTED	KICK OFF PARTY SCHED.	WELCOME EMAIL SENT	SIGN UP FOR NEW PARTNER TRAINING	48 HR. FOLLOW UP PARTY PLAN	SCHED. BIZ PLANNIN SESSION	SEND WELCOME PACKET/ POSTCARD	HOLD BIZ PLAN. SESSION	KICK OFF PARTY HELD	30 DAY FOLLOW UP
						-				_	
										_	

Team Prizes

DATE	NAME	PRIZES	ACHEIVEMENT	SENT

DATE	NAME	PRIZES	ACHEIVEMENT	SENT