10 Steps for Fall Planning Worksheet

Here are 10 steps you can take this week to help you plan for the busiest season in your direct sales business.

1. Set a goal for the number of parties you intend to hold each month during the fall selling season.

   **My monthly booking goals** (how many parties will you do each month):

   September _____ October _____ November _____ December _____

2. Decide on a number that represents your ideal sales month? If you don’t know, how will you create it?

   **My ideal sales month total**: $__________________

3. Decide how many people you’ll sponsor each month.

   **My monthly sponsoring goals**:

   September _____ October _____ November _____ December _____

4. Get your office/work space organized and working for you

   **Three steps I’ll take today to organize my space**:

   ____________________________________________________________________

   ____________________________________________________________________

   ____________________________________________________________________

5. Create a set schedule for your business using the following formula:

   **My Schedule**: 
I will work ______ hours per week. I will work ___ days per week.

I will work ______ hours per day.

Now use the above to intentionally plan your entire September through December season by creating a schedule which encompasses everything that’s important to you. Schedule your personal time, time with your family and spouse/significant other, business activities, desired dates for parties, opportunity events, meetings, etc.

6. Decide when and how you’ll implement what you’re learning during this challenge. Ask yourself what practices you’ve put off implementing in the past that you KNOW will bring you the greatest results. Now is the perfect time to implement them!

   **I will implement the following three practices that I’ve put off until now:**

   __________________________________________
   __________________________________________
   __________________________________________

7. Identify your excuses for not applying energy to your business? (I’m too busy, I don’t have enough money, people won’t book parties with me, etc.)

   **My top 3 excuses:**

   __________________________________________
   __________________________________________
   __________________________________________

   What are these excuses costing you? What are you missing out on by NOT doing what you need to do and using these excuses to keep you stuck?

   **What these excuses are costing me:**
8. Identify the limiting beliefs that block you from succeeding (I'm afraid of rejection, I will disappoint someone, it's hard to get bookings, no one wants to join my team, etc.)

My top 3 limiting beliefs:


9. Create specific weekly/monthly/quarterly goals. Where will you be by the end of the year?

My 5 weekly goals:

Some examples of powerful weekly goals:

- Send thank you cards to your new hosts immediately after they schedule a party.
- Invite every guest to host a party and be creative with your language.
- Hand out 3 opportunity packets at every party.
- If you are a leader with a team, schedule a weekly support coaching call with every representative who is interested in developing their business.
- Make 10 calls a week inviting guests to hear about the business opportunity.
My Monthly goals:

Some examples of powerful monthly goals:

- Book at least 8 parties
- Host 1 opportunity event
- Sponsor at least 1 person
- If you are a leader, host 1 training/meeting

September

________________________________________

________________________________________

________________________________________

October

________________________________________

________________________________________

________________________________________

November

________________________________________

________________________________________

________________________________________

My Goals for the 4th quarter:

Some examples of powerful quarterly goals:

- Promote to the next level in my compensation plan
- Earn the company incentive trip
- Promote at least one leader on my team
- Host my own party or open house and invite past hosts, guests, friends
10. Decide what actions you’ll take during this 10 day challenge to move you closer to your goals.

My top 3 action steps for the 10 day challenge:

Challenge: Complete this worksheet and create your calendar for the next 3 months. Keep this completed sheet handy as you move through the next few months so you know exactly what you do to have a successful 4th quarter.