

# Consultant Organízer Success Planner

Plan for your success and you will have a plan to guide you to achieve your goals. ~Lou Ludwig



# Marketing Subscriptions

Site Name	Advertising Package	Cost/ Fee	Expiration	Username	Password Hint
Constant Contact	Basic	19.99	1/1/10	Ultimate Biz Planner	<i>Ç01</i>
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20		you m Allov	arketing wing you	o document sites for the to keep trac Package Type	year. k of
		Userna	ame, and	Passwords I	lints.

## Log-In Reminder

Wahaita		
Website	Username	Password Hint
BusinessCardsForBusiness.com	Ultimate Biz Planner	<i>Q</i> 01
BasinessSapplies.com	UltimateBizPlanner	GetO2
Email Marketing, com	UltimateBizPlar	<i>Q201</i>
Social Media, com	Ultimate Diz Fourmer	g011
		4
	$\bigcirc$	
		2
	Q.	
	This is a great spot	to put the websites
	that are associated	with your business.
	We don't advise you	ı to write your pass-
	word but something t	to remind you in case
	you forget. For exam	ple, if our Password
	was GetOrg	anized1 our
	Password Hint is G	D1. We also recom-
	mend you use differe	ent variations of your
	password to protec	



direction. "- Nido Qubein

Monthly Focus Page

Current Career Level:\_\_\_\_\_

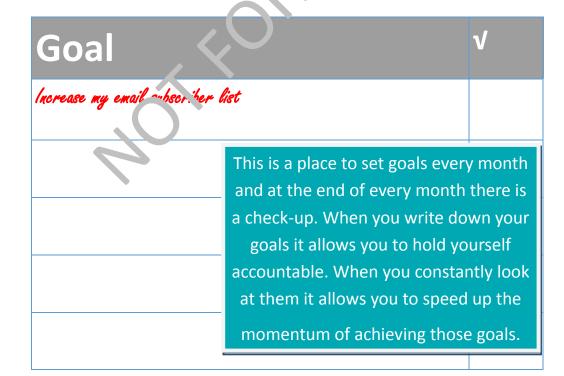
Monthly Career Goal Level:\_\_\_\_\_

Sales Goal:

Empowerment Goals:\_\_\_\_\_ Opportunity Meetings:\_\_\_\_\_

Contacts throughout the month: \_\_\_\_\_

Name	Phone	Reason
Jane Doe	555-123- <del>4</del> 567	Grow basiness/Gain . <sup>D</sup> ient
	0	



# Annual Focus Page

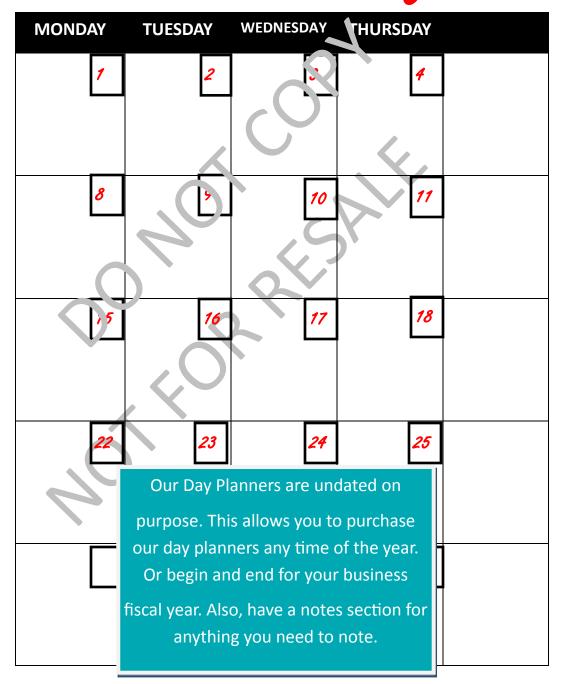
Business Beginning Care	
Yearly Sales Goal:	
Beginning:	
Mileage:E	ind Milleage:
Opportunity Meetings:	
Successline Additions:	
Juccessine Additions	
Party Totals:	
Expo : Netw	orking Events:
Conference Calls Attend	
Yearly Corporate Traini	ng:
Date:	Location:
Cost:	_ Incentive Gual:
Expo : Net	working even s: <u>10</u>
Conference Calls Attend	d: <u>36</u> Training Meetings: <u>12</u>
Speaking /Other Events	: <u> </u>
Social Media Reach:	
Facebook:_ <u><i>5,000+</i></u>	Twitter: <u>10,000+</u> Other
( ):	
Linked In:	Pinterest: Google +:
Tumblr:	Other ( ):
Marketing Campaigns/	This is where your year begins.
(TV/PRINT/RADIO/WE	Whether it is the middle of the year or
1.	January 1st our calendars are undated
2.	so you can begin where you want to.
	Our Annual Focus Page allows you to
4.	
5.	take steps to plan your Successful
other Ideas:	Business Year.

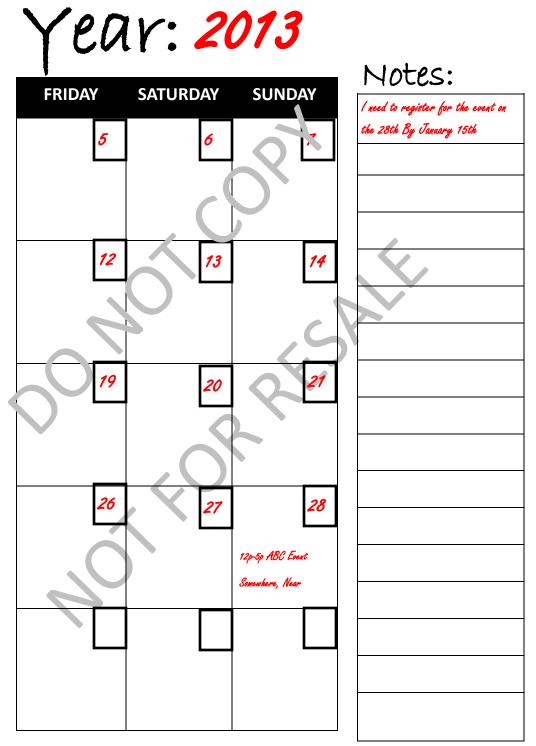
## Possible Parties

Month: <u>March</u>

Name: Jare Doe		
Address: 123 My Next Part	y Lane SomeWhere, USA	
E-mail: janedoe @domain.com	,	
Phone: 555-123-4567		rer: Great Party Previously 1/18/13
Contact Reason: Says va	nti to have a birthday party	mid-March
Name:	5	
Adures.		
E-mail		
hone:		Referrer:
	-	Date:
Contact Reason:		
Name:	This section i	s for that guest who says
Address:		have a party in the future
E-mail:		when. Log them in the
		Lead Log and have them
Phone:		ople you call when trying
	to fill your c	alendar for that month.
Contact Reason:		

# Month: January





Week of:	1/1/13-1/7/13	

Monday 1/1/13	
6a Workout	6p Sign Up and Train New Recruit
3p Meeting at Coffee Shop	
Tuesday	
Wednesday	
6-8p Networking Event	
Thursday	
Friday	
Tp Jane Dow Party	
Saturday	
2p Janet Doe Party	Log your daily
Cundeu	schedule here for
Sunday	each week.

		www.ontimatebizrianner.co	0111			
	М	leekly Success Plan				
	Marketing 🔏 Make a Sale _2 Sign-Up Recruit _3					
Weekly Mi	leage <u>195</u>	_ Weekly wholesale حطو ۲:	\$ <u>525</u>			
Weekly Re	tail Sales \$ <u>1050</u>	Business Aiu \$ <u>_50</u>				
Name		Reaso	Pho	ne Number		
Jacklyn Smi	th	vind at Event	555	231-4455		
Sue Who		Collaboration	555-,	222-1 *22		
Coco Pebbles	8	Possible New Recruit	555-	3. <sup>3</sup> -2211		
Goals for W	/eek:					
<u>Ad three r</u>	<u>recruits i my teum. Mak</u>	ke the next career level in		, ,		
Name	Jane re					
ddress	1234 Somewhere Nice, A Great 1	Place, USA				
Ce. <sup>¬</sup> hone	555-123-4567		Alt #:			
E-mail:	janedoe @domain, com					
Referrer	Jacklyn Smith		Contact Date: 1	2/1/12		
Party Date	1/5/13	Time: .30p	Type: Girls Nigh	t In		
Hostess Packet Sent: 12/1/12	Date Invites Sent: 12/1/12	Numb Guest: 20 Confirmea uest: 15	After Party Follow-up: 1/14/13	Referred Shows: 2		
Follow-Up Contact: 12/13/12Follow-up ContrRe inder Coaching: 1/2/13Party Total \$758,47Mileage: 20 miles RT						
Name						
Address						
Cell Phone						
E-mail:		Hostess Coa	Ŭ			
Referrer	Referrer successful party. Our Hostess Profile is a					

Party Date

Hostess Packet Sent:

Follow-Up

Contact:

Date Invites Sent:

Follow-up Contact:

www.UltimateBizPlanner.com

successful party. Our Hostess Profile is a great place to keep track of your Coaching. Have a plan to success is also key to success. This information is also great for tax time.

### I can and I will achieve every goal that I set for my self and my business.....

Reach Goal: / a	om the best	Day Pl	lanner for	<u>Women</u> B	usiness Dwn	ers, L	Entrepreneu	(#S,
and Direct Sales	Consultant,	Helping	Women B	SIN. 98 UN	er become	more	productive	and
efficient in their b	usiness.							
	<i>n</i> ., <i>i</i>		11	0.1 . 0				

Active Goal an living and active

1. 2.

3.

4.

5.

6.

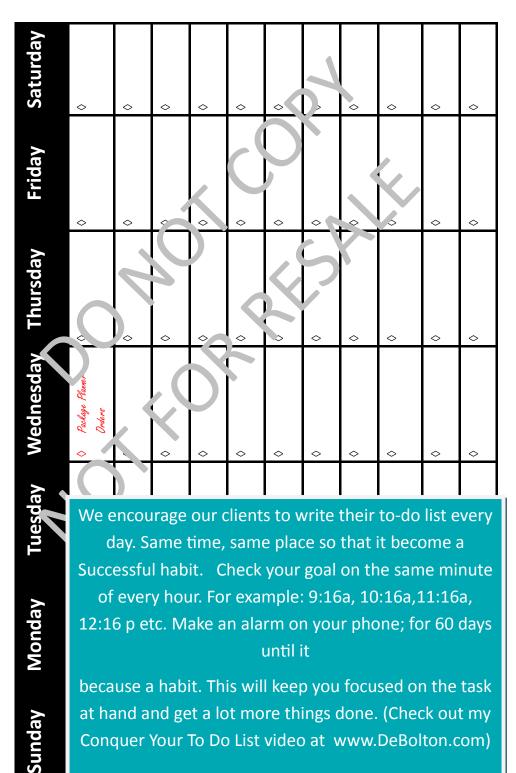
7.

We encourage our clients to write their goals every week. Same time, same place so that it become a Successful habit. Your Reach Goal is something you aspire for you or your business if all resources were available to you.

### Your

8. active goal is a healthy lifestyle goal you have for yourself overall. The ten goals are things you strive to achieve
 9. that will help you get to your reach goal. (Check out my blog on my Success with my past business' and current business using this goal obtainment model. www.DeBolton.com)





Conquer Your To Do List video at www.DeBolton.com)

### Stellar Sellers

Name	Distributor #	Sales Amount
1. Jane Doe	12345	\$12345
2. June Smith	67890	\$12333
<b>3</b> . Sally Sells	112233	\$12332

## Term: Monthly Sales

Distributor #	Name	Sales Amount
12345	Jane Doe	\$12345
67890	June Smith	\$12333
112233	Sally Sells	\$12332
	$\sim$	
	Successline is also known as downline. This is a place to check your teams status and opportu- reward or encourage them for efforts. Every month has a Success CheckUp Page. The Successline track your Success for the mo- recruiting.	k-up on on unities to or their ccessline Recap is to

## Successline Recap

### Monthly Additions

Name	Distributor	Date Started	Location		
Wanda Recruit	41235	1=1/13	Somewhere, USA		
S	uccessline is also l	known as your			
has a Successline F	downline. This is account for your successful month. Every month has a Successline Recap. See How Many Downline you added, who was interested but did not sign up or what did you giveaway this month to new signups.				
Future Successine					
Mme	Expected Sign-O	n Kit	Contact		
Wilma Signup	2/1/13	Basic	1/15/13		

### Sígn-Up Gíveaways

Name	Giveaway	Amount
Wonda Necruit	20 Catalogs	\$12,75

Month Start Career Leve	el: <u>Manager</u>			
Month End Career Level: <u>Director</u>				
Monthly Sales Total: <u>\$10,000</u>				
Beginning: <u>\$8,000</u> End: <u>\$18,000</u>				
Mileage: <u>123,456</u>				
	$\cap$ $\langle$			
Opportunity Meetings:	Successline Additions: <u>7</u>			
Party Totals: Parties Booked:				
Expo's Par dicipated:	Expo's Booked:			
Monthly Meeting Atten	ded:			
Conference Calls Attend	Land.			
What Worked Well:	This is a place to check-up on the goals			
	that you set each month. Every month			
	has a Monthly Focus Page and Monthly			
	Check-Up. When you write down your			
M/hat M/auldurau haus	goals it allows you to hold yourself			
What Would you have				
	accountable.			

Reward for Meeting Goal:

# Annual Check-Up Page

Yearly Sales	Total:			
Beginning Sa	g Sales \$ Ending Sale ; \$			
Beginning N	1ileage:	_Encl:Mileage:		
Opportunity	Meetings:	-) (,		
Client Additi	ions:			
	Νει vorking E			
		Training Meetings:		
	thei Fverits:			
Social Me no				
	Twitter:			
	Pinterest Other (			
	les Total:	)·		
January	\$	Client Additions		
February	\$	Client Additions		
March	\$	Client Additions		
April	\$	Client Additions		
May	\$	Client Additions		
June				
July	Thic nd			
August		ige is a great		
September	accountab	ility tool and tax		
October		tool.		
November				
December -	7	Cilent Additions		

# Party Leads

Consultant Orgar'zers

Worry about reing better; bigger will take care of itsolf. Think one customer at a time an I tak ? care of each one the best way you can. ~Gary Comer

# Party Leads www.UltimateBizPlanner.com

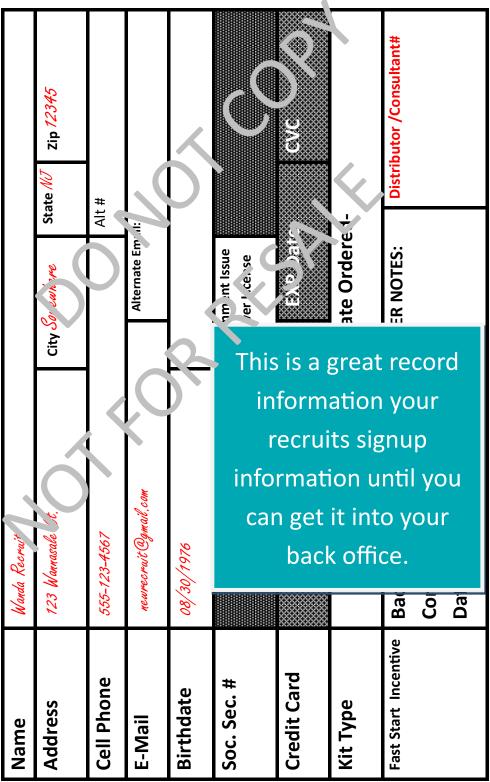
Name Warda Party	Home <i>555-123-4567</i>
Address 123 Party Place	Cell 555-222-1234
Contact 1/14/13	Email: wandapartyg @mgail.com
Date Book 1/14/13	Party Date/time: 2/18/13 2p
Name	Home
Address	Cell
Contact	Email:
Date Book	Party Date/า. าe
Name	Hume
Address	Le T
Contact	Email:
Date Book	
Name This is a pla	ce to log
Name Address Address	
Adduces	
Address possible par	
Address possible par	ty leads.
Address possible par Contact Date Book	Party Date/Time:
Address possible par Contact Date Book	Party Date/Time: Home





### Recruits Leads

Name <i>Wanda Recruit</i>		Cell 555-123-4567			
Address <i>123 Wannasale Ct, S</i>	Address 123 Wannasale Ct. Somewhere, NJ 12345				
Contact		Email			
Kit Type: <i>Premier</i>	I	Earn a Kit: <i>No</i>			
When?					
Notes: Wants to get started to	oday.	2			
		$\sim$			
		$\mathbf{O}$			
Name					
Address					
Contact		Email			
Kit Type:					
Notes:	I his is a	great record			
	informa	tion you get			
	about yo	our possible			
Name	recr	ruit and			
Address	conversat	ions you may			
Contact	ł	nave.			
Kit Type:					
Notes:					



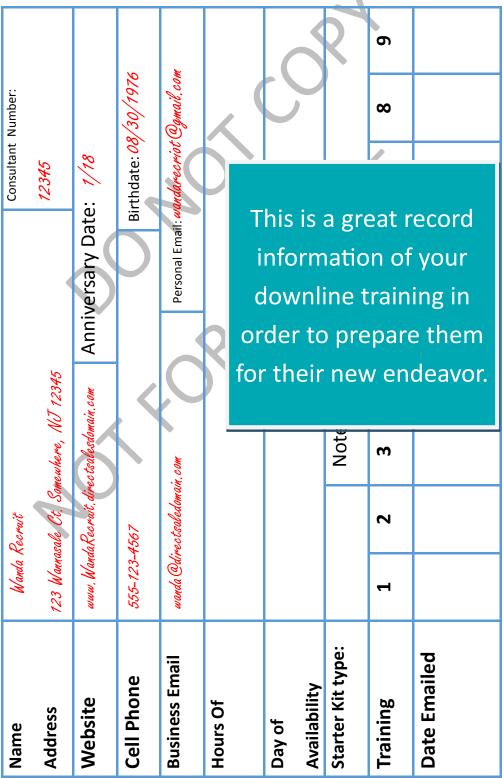


# Successline Training

## Successline Management

Distributors Name	Distributor #	Last	Last Activity	Notes	
		Contact Date	Date/ Amount		
Jane Gogetter	0123456	01/23/45	Sale \$123	Taking a break ,	
			0		
		6			
	20			at record 1 of your	
		- dow	nline in	order to	
				nem and them to	
	<del>.</del> 05		their go	oals.	
4					
~					

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Contact Type: O Phone O Text OEmail O Other	Contact Type: O Phone O Text OEmail O Other	Con' act Type: O Phone O Text OEmail O Other	Contact (ype: C Phone O Text OEmail O Other	Contact Type: C /ho le C Text OEmail O Other	Contact Type: O Phone C To Contact Type: O Phone C To Contact Type:	Contact Type: O Phone O Text OEmail J Other	Contact Type: O Phone O Text OEmail O Othe	Contact Type: O Phone O Text OEmail O Other	Contact Type: O Phone O Text OEmail O Other	Contact Type: O Phone O Text OEmail O Other
	7	Ó		Dc	iform own l		ord n of v n orc	your Ier to		
Contact Date:				enco	oura	goa	em t ls.	and to the ers, All Rig		ed







Catalog Leads

## Catalog Leads www.UltimateBizPlanner.com

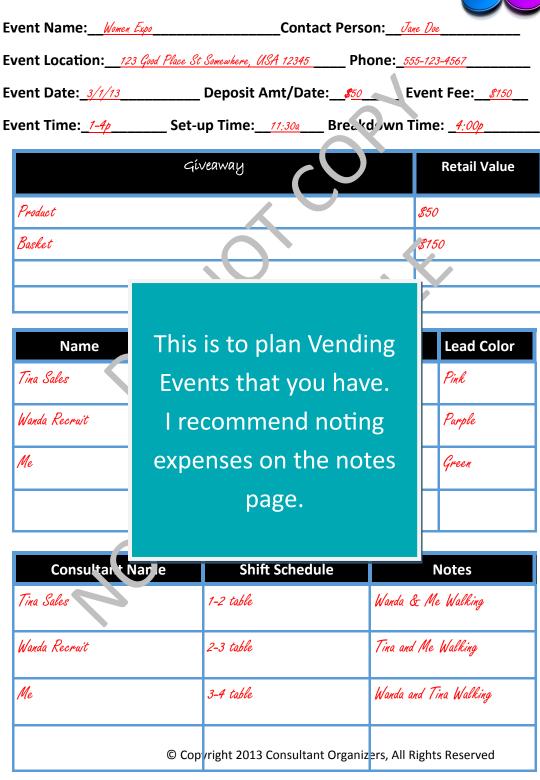
Name		Home
Address		Cell
		Contact Date:
Email	(	Da₊`ı∕Jailed
Name		⊔, me
Address		Cell
		Contact Da •:
Email	~	Date Mail 1
Name		Ησηέ
Address		
Email		
Name	This is a great	
Address	record	
•	· · · · · · · · · · · · · · · · · · ·	leads
Email		
Name		
Address		
Email		Date Malled



Networking G Event Planning

Sharing is sometimes more demanding than giving. -<u>Mary Catherine Bateson</u>

### Event Planner



# Networking Events

Event Name: <u>ABC Event</u>\_\_\_\_\_ Contact Person: Jane Doe Event Location: A Great Networking Location Phone: 555-123-5670 Organization: A Great Networking Organization Member or Non-Member (Circle One) Event Date: <u>1/1/13</u> Event Fee:\_\_\_\_\_ Event Time: 7:30 Become Member of Network Organization Yes or No (Circle One) Follow-Description Up **Contact Date** Name **Reason for Contact** (circle Jane Doe, Great Business Inc. Great Business Collaboration Opp YN 1/5/13 Lunch Meeting Y/N Y/N

Networking is a great opportunity to grow your business. Sometimes we can get caught up in the follow-up. You receive lots of business cards and not sure which one you want to connect with in the future. Using our Optimizer during or after a Networking Event can help you Navigate valuable Business

Opportunities. Also, the event information is great for tax time. We recommend stapling any receipts that you acquire from purchasing meals, drinks etc. on this sheet and using this during tax time as well.

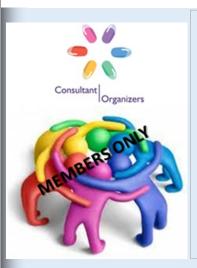


# Other Tools

Party Date Party Date Hostess Name	www.UltimateBizPlanner.com	Sales (	Order Slip
Name	Your Consultant/Distributor I	nformation	
Address City	1pt/Suite		
Email	Phone tion on : os ing a carty Busines	s Opportu	unity
So I by CASH	COD CHARGE ON ACCOUNT ME	DSE RETD.	PAID OUT
Quantity	This is great for managing orders on the go or cash	ice	Total
	and carry on the go. For instance, if you get an		
	unexpected order you		
	have a few just in case receipts.	al	
		tess/	(
edit Card #		xp Date	
nature X		digit CC	V#
nank you!	© Copyright 2013 Consultant Organizers, A	All Rights I	Reserved

Delivery Confirmation	
Shipped/ Delivered Date	
In Stock	
Ordered	A great place to track backorders. To inform
Backordered Items	your customers in case you get an unexpected call and not at your desk
Customer Name	or access to your back office.
Hostess Name Cu	

## Check out our other products



#### Consultant Organizer Membership

Get access to Tips and Tricks to Organizing your Business. Downloadable documents that you can utilize. 12 Month Success Course that will keep you organized, and task driven all year long.

One Time Fee \$97 (\$10 off your Consultant Organizers Success Planner)

• Monthly Membership \$9.95

### Personal Business Organization Consultations

This one hour session will jump start your organization journey. This intense consultation will tackle the clutter in your business and allow you to find balance in your work.



1 hour Session \$67

#### NEED MORE?

Ran out of party lead forms, or need more sales receipts go to our website to get more inserts for your planner today!

### www.UltimateBizPlanner.com

We have been giving Women Business Owners their time back since 2013. Most of our clients have given us valuable feedback and we are always striving to have the best product. We would love your testimony on how our planner help you plan your success in business. Please contact us at

marketing@debolton.com.

If you are interested in making money off of referring people to our Ultimate Biz Planners contact us about our Affiliate Program or Referral Program. Check out our website www.UltimateBizPlanner.com for more details.

Looking for other tips how to make the most of your planner? Go to our site for www.UltimateBiz Planner.com

Thank you for purchasing our planner. We appreciate your business and wish you Success in your Business this year.

