

Weekly Strategy Worksheet for Downline

Step 1—Come Prepared & Be on Time

- Fill out appropriate Builder worksheet(s). For ranks above Silver, use multiple worksheets as needed.
- Be ready to report on progress from last week’s goals & action items

Step 2—Review Goals/Priorities & Action Items from Last Week

Step 3—Choose the track for this strategy session:

Track A—Objective: Solid Action Plan for next week (Use Builder Worksheets)

Track B— Objective: Use this track for the last week of the month when you are pushing for rank and need more volume

TRACK A—SET UP ACTION PLAN FOR NEXT WEEK; Review Ranking Goals & Builder Worksheet(s)

Rank goal for current month: _____ Rank goal for next month: _____

60-day goal: _____ Goal Date: _____ / 90-day goal: _____ Goal Date: _____

Fill out or Review Builder worksheet(s) in detail. Things to review:

1. Who will be hosting/teaching classes? _____

2. How many classes need to be set up on each qualifying leg? _____
3. Have I chosen the Incentives/Promotions for next month for my qualifying leaders, and have I discussed the incentives/promotions with my leaders? How are the incentives working? _____

Plan for this week:

1. Leaders to contact to host classes _____
2. Other people to contact to host classes _____
3. Events to set up _____
4. 1 on 1 meetings _____
5. 3-way calls _____

TRACK B—WHERE ARE YOU NOW.... WHAT DO YOU STILL NEED THIS MONTH

Qualifying Leader	Required Volume	Current Volume	Current Deficit	Additional volume expected by month end	Estimated Deficit
Example: JaneDoe	3000ov	2460ov	-540ov	250ov	-290ov
1.					
2.					
3.					
4.					
5.					

Step 4—Review progress in any Training you are currently involved in: _____

Step 5—Identify 3 Top Priorities & Action Steps for this Next Week

A – What is my first Goal/Priority for this week? _____

Action Item #1: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #2: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #3: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

B – What is my second Goal/Priority for this week? _____

Action Item #1: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #2: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #3: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

C – What is my third Goal/Priority for this week? _____

Action Item #1: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #2: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Action Item #3: _____
When will I have this completed? (Date) _____ Check box when Action Item is accomplished
How can my upline help me with this Action Item? _____

Step 6—[Both parties] Put action items in your calendar. Check when complete:

Step 7—Important Reminders, Choose those that apply: Plan to participate in & invite my team to the next: (Board of Directors, Leaders Circle, Team Training, Elite Retreat, Symposium, Convention, Post Convention Tour, Regional Conferences, Leadership, Diamond Club, Other): _____

