

# Weekly Strategy Worksheet for Upline

Your Leader's Name \_\_\_\_\_ Date \_\_\_\_\_

**Step 1—Reconnect & Ask Discovery Questions**

- Tell me about...(your week, your family, your work)
- How are you feeling about your progress in your business?
- What's the best thing that happened with your business this week?
- What's the most frustrating thing that happened with your business this week?

**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 your leaders 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 you chosen your Incentives/Promotions for next month on qualifying leaders, and have you discussed the incentives/promotions with your leaders? How are your 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 ongoing Training you are involved in** (Contacting/Following Up/Mentor Tips/Daily Challenges/Classes/Enrollments/Assignments, etc.)

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

**A – What is your first Goal/Priority for this week?** \_\_\_\_\_

Now, let's break that down into 3 action items to help you reach this priority:

**Action Item #1:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #2:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #3:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**B – What is your second Goal/Priority for this week?** \_\_\_\_\_

**Action Item #1:** \_\_\_\_\_

**Action Item #1:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #2:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #3:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**C – What is your third Goal/Priority for this week?** \_\_\_\_\_

**Action Item #1:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #2:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

**Action Item #3:** \_\_\_\_\_

When will you have this completed? (Date) \_\_\_\_\_

How can I support you with this Action Item? \_\_\_\_\_

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

**Step 7—Important Reminders, Discuss those that apply:** Will you participate in & invite your team to the next: (Training Challenge, Team Training, Elite Retreat, Symposium, Convention, Post Convention Tour, Regional Conferences, Leadership, Diamond Club, Other). Specific Plan: \_\_\_\_\_  
\_\_\_\_\_

**Step 8—Express excitement for your Leader and your belief in their ability to make their goals a reality**