Organizing Your Follow-up Efforts and Business

Since most of the paperwork you will manage revolves around the relationships you are developing, now is a good time to discuss organizing your business. Some people are likely to put everything on the computer; others prefer paper. The perfect system will be whatever works best for you. A simple approach is to get a nice two-inch, three-ring binder with at least eight divider tabs and group your paperwork by topic. Here are suggested tab names and the types of forms each section would house. Those forms marked with an * will not be introduced until Chapter 9.

Tab 1: Monthly Plan (tools to stay accountable to your DMO and activity level)

Monthly Event Planning Worksheet
Invitation List (Optional: available at NSA Online)
Weekly Call Planner (2x2x2x2)*
Royal Crown Monthly Scorecard*
A month-at-a-glance calendar if desired

Tab 2: Prospects (tools to track prospects to customers)

Easy as A-B-C
Memory Jogger
Connection Record Forms of prospects who have received information *(alphabetical order recommended)*

Tab 3: Customer Care (tools to track the series of educational exposures)

Connection Record Forms of customers (alphabetical order recommended)

Tab 4: Team Building (moving customers to distributors)

Designing a Team Worksheet (from Chapter 5)
Customer Care Worksheet*
Potential Team Member Profile*

Tab 5: Distributors (to track "next steps" and willingness to move forward)

Sponsor Checklist*
Distributor Care Worksheet*
Qualifier's Tracking Forms of team members
Royal Crown Monthly Scorecards of team members (Sponsor's Copy)*

Tab 6: Customer Genealogy (to track customer orders, shipping dates, and order status)

Your Qualifier's Tracking Form
With nsaonline.com level two membership, a Preferred Customer Genealogy Report is e-mailed from NSA each month (on or about the 25th)

Tab 7: PVC Reports (to track your progress to qualification and next steps)

As an nsaonline.com level two subscriber, Volume Reports will be e-mailed on the 5th, 10th, and 15th of each month.

Tab 8: Prospects/Mailing Lists (tools to maintain contact with prospects)

Name and address list of people who said "no" to Juice Plus+® , but gave you permission to put them on your mailing list. (Also, ask any cancelled customers if they would like to be kept on this list.)