

Direct Sales Planner

SMALL
5.5 x 8.5

Printable

www.ThePolkaDotPosie.com

January: _____

SUNDAY MONDAY TUESDAY WEDNESDAY

Yearly Expense Tracker

Category Jan Feb Mar Apr May

Mileage Tracker

Date Dest/To From Purpose Odometer Start End Total Miles

Replacement/Missing Items

Submit Date Item(s) Order# Customer Tracking# Reason/Notes

Notes

2014-2015 Overview

January 2014 February 2014 March 2014 January 2015 February 2015 March 2015

Order/Profit Tracker

Date Customer or Order # Wholesale Selling Tax Payment Commission Profit

Party Planner & Summary

Hostess: _____ Party Date: _____ Close Date: _____ Phone#: _____ Address: _____ email: _____ Hostess Plat#: _____

Initial Coaching

- Review Hostess Plan
- Confirm Date/Time
- Who to Invite
- Guest List Requested
- Save the Date! Call/text
- Discuss Outside Orders
- Show keys to successful party

Party Notes

Retail Party Sales: \$ _____ Wholesale Party Sales: \$ _____ Total Profit Earned: \$ _____ Income Earned Per Hour: \$ _____ Hostess Credit: \$ _____ Number of Sales: _____

Post-Party Checklist

- RS-14 Days Out
- Event Captured
- Booking Confirmation Sent
- Secure Guest List
- Prints emailed/delivered
- Ask Guest to Bring Guest
- Guest Return Refreshments
- 1 Week Out
- Follow-up Call
- Secure RSVPs
- Review Rewards & Wish List
- The Day Before
- Guest Reminder Calls
- Confirm RSVPs
- Confirm Directions/Arrival Time
- Setup needed?

Post-Party Checklist

- Follow-up/Additional Orders?
- Contact Non-Shows
- Blank Your seat
- Fillies Orders
- Finalize Hostess Order
- Close Party
- Contact Booking/leads

Week of: _____

MONDAY TUESDAY WEDNESDAY THURSDAY

Monthly Expense Tracker

Date Category Item/Merchant/Client Payment Type Total

Gift/Giveaway/Discount Tracker

Date: _____ Customer: _____ Item #(s): _____ Payment Method: _____ Gift Giveaway Fundraiser Discount

Lead Contacts

Name: _____ Address: _____ Email: _____ Phone#: _____ Interested in: Hosting a Party Joining the Team Buying Product No Interest

Consultant Contacts

Name: _____ Consultant #: _____ Jan Date: _____ website: _____ Phone #: _____ Address: _____ Email: _____ Notes: _____ Birthdate: _____

Hostess Contacts

Hostess Name: _____ Address: _____ Event: _____ Date/Time: _____ Close Date: _____

Monthly Goals & Overview

Monthly Personal Goals: Monthly Personal Overview

Personal Volume: \$ _____ Profit: \$ _____ Sales: \$ _____ Recruits: _____ Parties: _____ Bookings: _____

Monthly Team Overview

Goal Team Volume: \$ _____ Actual Team Volume: \$ _____

New Recruits

My incentives: _____ Who earned them: _____

Notes:

Top 3 Team Goals:

- Coming together is a BEGINNING
 - Keeping together is PROGRESS
 - Working together is SUCCESS
- Henry Ford