

Preparing For and Creating 2018 Fiscally

Compiled by Sr. Director Sherry Hanes

- **Suggestion: Do the Fiscal during non-people hours.**
- **So you may ask, what do many of these things have to do with \$\$\$? They all have an effect on your bottom line!**
- **These are generally the things we resist that persist until we get them in place. They are systems that you put in place so you can operate in the joy zone because they allow you have fun, be clear, operate with focus, have energy for others & feel a great sense of accomplishment because you are no longer box jumping, operating from guilt, being confused, having a lack of commitment, missing rules, deadlines and details.**
- **When you have these systems in place, you no longer have to think about these items as you will just routinely without putting in any energy, effort or thought, do these things & will arrive at the point where they can almost happen without you as you learn to delegate and buy time by hiring and/or bartering for help.**

(Outline any necessary answers on back)

- ___ **Do I have sufficient inventory to operate my business? If not, what is my plan to remedy that obstacle?**
- ___ **Do I have a separate checking account & debit/credit card for my business?**
- ___ **Do I have business cards, labels for my products, and stamps for my literature?**
- ___ **Do I have a system in place for completing my weekly accomplishment sheet & making my weekly bank deposit routinely each week?**
- ___ **Do I have a method of determining my monthly paycheck & paying myself?**
- ___ **Do I have a system in place for compiling monthly expenses such as file folders, envelopes, Boulevard, etc.?**
- ___ **Do I have a system in place for tracking my mileage?**
- ___ **Do I have a system for ordering, replacing, & managing my inventory?**
- ___ **Do I complete a Weekly Plan Sheet or have some method of determining when I will work my business each week?**
- ___ **Do I have a system of tracking deliveries to be made?**
- ___ **Do I have a method of tracking outstanding monies owed, product trades, product returns/replacements, etc.?**
- ___ **Do I utilize a Daily Calendar/Tasks list?**
- ___ **Do I daily prioritize my Tasks in the order of people, followed by paper, followed by items to delegate?**
- ___ **Do I have a system in place to ensure promised, proper, integrity filled follow-up with existing & prospective customers, team members & prospective team members, hostesses, new customers, etc.? Tickler system, Boulevard tickler, list, notebooks, brain book, etc.?**
- ___ **Am I ready to do business having my demonstration/mirrors/display, etc. cleaned and ready to hold a facial or class on short notice? And do I have a system of always being packed & ready?**
- ___ **Are my products labeled and brochures stamped?**
- ___ **Do I have business cards & brochures with me at all times?**
- ___ **Do I have a Car Emergency Kit with extra sales tickets, business cards, brochures, tray & mirror set up, foil packs, looks, demo applicators, disposable cloths, product bags, etc.?**
- ___ **Do I have Hostess Packets made up in advance?**
- ___ **Do I have Team Building Packets made up in advance?**
- ___ **Do I have Success Training, special events, important dates & deadlines marked on my calendar as soon as I know them?**
- ___ **Do I have a method of processing my email? Tip: Schedule 30 minutes in the AM & 30 minutes in the PM and follow 5 steps: (1) Go through & trash & unsubscribe (2) What can you delegate? (3) If it takes 2 minutes or less do it now. (4) If it takes more than 2 minutes schedule to do later. (5) File what needs to be kept for reference/ print what needed to printed and acted upon. 50% of email will be trash, 30% can be done in 2 minutes or less & 20% will need to schedule more time for.**