



Use this checklist and calendar to map out and deliver outstanding meetings, workshops, and agent contests this month. Write meeting details, tasks, and deadlines on the calendar. Create a pro-active plan and delegate duties as needed.

## Sales Meetings

- ☐ Set your meeting date(s)
- ☐ Create agendas for each meeting ([management](#) and [agent](#))
  - ☐ Select a Learning Sprint
    - [Monthly Goal Setting](#)
    - [3 Ways to Market Yourself](#)
    - [Close More Business With Open-Ended Questions](#)
    - [Guest Speaker](#)
  - ☐ Choose a [Spark Your Business](#) idea to share
    - 9/13/22 National Peanut Day (pop by)
    - You Are Appreciated S'more Than You Know (pop by)
    - You & Your Referrals are the Core of My Business
  - ☐ Identify other items to include on your agenda
    - Contest announcement, update, or results
    - Company updates
    - Marketing updates
    - Market trends
- ☐ Customize your meeting [PowerPoint](#) presentation
- ☐ [Promote](#) your meeting
- ☐ Prepare to deliver

## Workshop: Business Technology Mastermind

- ☐ Set your workshop date
- ☐ [Promote](#) your workshop
- ☐ Review [instructions](#) and prepare to deliver

Sun	Mon	Tue	Wed	Thu	Fri	Sat
<i>"Listen to your customers, not your competitors."</i> Joel Spolsky				1	2	3
4	5 <i>Labor Day</i>	6	7	8	9	10
11	12	13	14	15 <i>First Day of Hispanic Heritage Month</i>	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

## 3Q22 Agent Contest: Top 10

Refer to the [Top 10 Contest Instructions](#) for suggested tasks if you have not yet launched your contest or aren't ready to conclude.

### Contest Conclusion

- ☐ Keep final scoreboard secret until the big reveal.
- ☐ Make a show of awarding prizes.
- ☐ Take photos of winners and the entire group. Share pictures and videos on social media, company newsletter, breakroom bulletin board, etc.