

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
 - [Start Your Plan with a SWOT](#)
 - [The Art of Goal Setting](#)
 - [Production Goals Calculator](#)
 - [Monthly Goal Setting](#)
 - [Guest Speaker](#)
 - ☐ Choose a [Spark Your Business](#) idea to share
 - National Taco Day, October 4th (pop by)
 - Carve Out Time for Your Clients (pop by)
 - National Pizza Month (October) Client Appreciation Event
 - ☐ 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: Create Your Business Plan

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
<i>"Good fortune is what happens when opportunity meets with planning."</i> Thomas Edison						1
2	3	4	5	6	7	8
9	10 Columbus Day US Indigenous Peoples' Day	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31 Halloween					

4Q22 Contest: Stacks of Kindness

This game is a fun way to engage your entire team, promote your company's values, and build your company culture.

- ☐ Review the [Stacks of Kindness](#) game instructions and documents.
- ☐ Customize your game.
- ☐ Setup your game in the breakroom.
- ☐ Award prizes, complete acts of kindness, and have fun!