



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
 - o [Create a Budget Like a Pro](#)
 - o [Exit Strategy: Succession Planning](#)
 - o [Business Planning: Visioning](#)
 - o [Monthly Goal Setting](#)
 - o [Guest Speaker](#)
 - Choose a *Spark Your Business* idea to share
 - o National Donut Day, Nov. 5th (pop by)
 - o Veterans Day, Nov. 11th (community service)
 - o National Computer Security Day, Nov .30th (SOI email)
 - o Football Season Pop By
 - Identify other items to include on your agenda
 - o [Stacks of Kindness](#) game updates
 - o Company updates
 - o Marketing updates
 - o Market trends
- Customize your meeting [PowerPoint](#) presentation
- [Promote](#) your meeting
- Prepare to deliver

Workshop Agent "Hot Seat" Mastermind

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31 Halloween	1	2	3	4	5
6	7	8 Election Day	9	10	11 Veterans Day	12
13	14	15	16	17	18	19
20	21	22	23	24 Thanksgiving	25	26
27	28	29	30	<p>"A budget is telling your money where to go instead of wondering where it went." <i>Dave Ramsey</i></p>		

A Look Ahead

December: Risk Management

In December, we focus on keeping agents and clients safe. Topics include identifying risks, personal safety, cyber security, and open house safety.