



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
    - [Open House Safety](#)
    - [Risk Self-Assessment](#)
    - [Interview with Tener Tech](#)
    - [Monthly Goal Setting](#)
    - [Guest Speaker](#)
  - Choose a [Spark Your Business](#) idea to share
    - National Poinsettia Day, Dec. 12th (pop by)
    - Wrap Up the Year (pop by)
    - Happy New Year (pop by)
    - Act of Kindness—Help the Homeless
  - Identify other items to include on your agenda
    - [Stacks of Kindness](#) game updates
    - Company updates
    - Marketing updates
    - Market trends
- Customize your meeting [PowerPoint](#) presentation
- [Promote](#) your meeting
- Prepare to deliver

## Workshop Safety Culture

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
"Safety first is safety always." <i>Charles M. Hayes</i>				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24 Christmas Eve
25 Christmas Day	26	27	28	29	30	31 New Year's Eve

## A Look Ahead

### January: Attracting New Business

In January, we focus on helping agents attract new business. Topics include creative prospecting, leveraging open houses, and finding a niche to connect with new clients.