



Use this checklist and calendar to map out and deliver outstanding sales meetings 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
 - [Create Your Business Plan - Part 1](#)
 - [Create Your Business Plan - Part 2](#)
 - [Create Your Business Plan - Part 3](#)
 - [Monthly Goal Setting](#)
 - [Guest Speaker](#)
 - Choose a [Spark Your Business](#) idea to share
 - Sweetest Day, October 21 (pop by)
 - National Checklist Day, October 30 (mailing)
 - Halloween, October 31 (pop by)
 - Daylight Saving Time Ends, November 5 (email)
 - Identify other items to include on your agenda
 - Company Updates
 - Marketing Updates
 - Market Trends (local and [national](#))
 - Sales Contest
- Customize your meeting [PowerPoint](#) or [Google Slides](#) presentation
- [Promote](#) your meeting
- Prepare to deliver

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9 <i>Columbus Day</i> <i>Indigenous People's Day</i>	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31 <i>Halloween</i>	<p>"If you fail to plan, you are planning to fail." <i>Benjamin Franklin</i></p>			

A Look Ahead

November: Financial Strategies

In November, we help agents with budgeting, expense tracking, retirement planning, and visualizing their future success.