Direct Sales Checklist
Daily | Weekly | Monthly | Yearly

penny

Daily

PENNY
- Check the Daily and complete your daily tasks

CUSTOMER CARE
- Check your emails
- Check your texts and calls
- Check your social media messages

Top Tip
When replying, cross-reference and update Penny

BUSINESS GROWTH
- Check your back office for important updates and sales reports
- Post to social media
- Personal development and learning

Top Tip
Check out the Pennyverse!

LEADERS
- Share marketing/customer care tips with downline
- Connect with team and support new members
- Check Penny's Team Care to see who deserves a shout out and who needs help

Weekly

MONDAY
Motivate team

TUESDAY
Learn something new

WEDNESDAY
Prospecting and admin

THURSDAY
Create, plan and schedule social media content for the upcoming week

FRIDAY
Celebrate your success, customer or team shout out

SATURDAY
Unwind, relax, spend time with friends and family
Urgent work only!

SUNDAY
Review past week and set new weekly goals

Monthly

- Prepare for any customer special occasions: Birthdays, anniversaries, graduations, celebrations, etc.
- Review income and expenses, update report
- Analyze business growth and income. Check to see if you're on track to hit your annual goals.
- Double-check back office for upcoming special deals, new products or discounts

Yearly

JANUARY Bookkeeping for previous year. Learn about new changes in your company.

FEBRUARY Plan out new goals and objectives to hit the ground running.

MARCH Quarterly review - Is your business on track?

APRIL Taxes and preparation for new spring products

MAY Preparing for summer products

JUNE Quarterly review - Reassess your goals and objectives.

JULY Host a networking event (virtual or in-person)

AUGUST Take a break, it's summer!

SEPTEMBER Quarterly review - Are you going to hit your goals?

OCTOBER Expand your knowledge. Take a course to help grow your business.

NOVEMBER Host a customer-focused event (virtual or in-person)

DECEMBER Quarterly review - Goal setting for the following year