



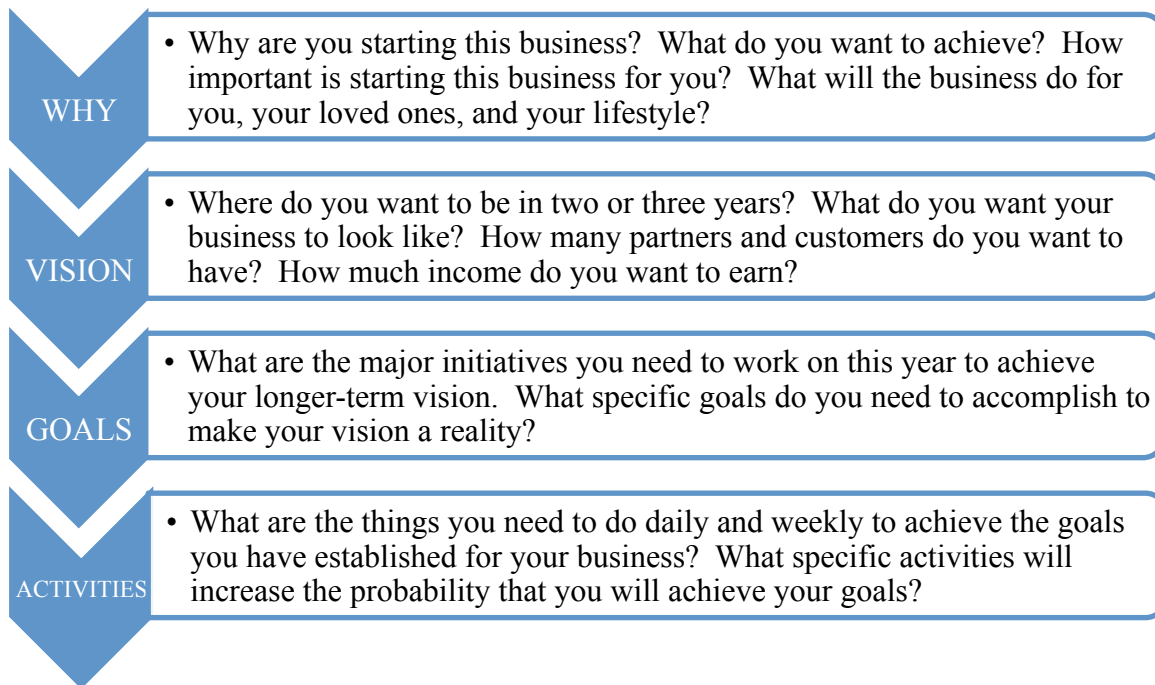
Direct Selling Success

Lesson Three Planning Your Success

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The Planning Process

Effective business builders follow a four step planning process. First, they clarify their “WHY” or purpose for starting the business. Second, they create a VISION of where they would like to be in two or three years. Third, they set regular GOALS to achieve their vision. And fourth, they define daily ACTIVITIES they will perform to achieve their goals. So the “why” leads to a vision; the vision leads to goals; and the goals lead to critical activities. This process is outlined below and reviewed in detail in this workbook.



1. Clarifying Your WHY

Articulating the reasons you are starting your new business is important to your long-term success. If you are clear about what you want in life, and you know this business can get you there, you will be much more likely to work with passion and tenacity over time. Your “why” will provide focus. Your “why” will provide energy. Your “why” will provide the commitment you need to work hard.

In the following exercise, write out all the reasons you are starting this business. Revisit this list regularly, especially during difficult times. Never lose site of the things that matter most to you, and stay anchored to the course that will lead you there.

My “Why” for Starting this Business	
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

2. Creating Your VISION

Your vision should describe where your business will be at the end of a chosen time period, which is usually three years. Just like an architect renders a beautiful building to be built, you need to describe the organization you are excited to build. Include a description of the following:

- Types and number of products you will sell
- Team you will build including number of distributors
- Types and number of retail customers you will serve
- Financial status of your company including desired income
- Lifestyle you will enjoy with your family and friends

This vision will continue to motivate you through the ups and downs of building a new business. It will also be the basis for the goals you will set at regular intervals.

My Three Year Vision for this Business
My Products and Services:
My Team/Associates/Partners:
My Retail Customers:
My Financial Status:
My Lifestyle:

3. Setting Your Goals

Setting and achieving goals is critical to building a successful new business. Goals clarify your priorities, enhance your motivation, and help you achieve your vision. Goals are much more likely to produce specific results when they meet the qualifications of the SMART test:

- S = Specific
- M = Measurable
- A = Attainable
- R = Relevant
- T = Time Phased

Examples of Weak Goals

Talk to people about my products
 Line up some distributors
 Create my board of advisors
 Make some money this month
 Find some new retail customers

Examples of SMART Goals

Make 10 appointments today to talk about my products
 Have 3 new distributors in place by the 15th of this month
 Have 5 talented advisors in place by the end of this month
 Make a minimum of \$1,200 by the end of the month
 Add 20 new retail customers to my business this month

Write down your goals for the next few months in the space provided below. Make sure each goal is SMART: specific, measurable, attainable, relevant, and time phased. Setting goals regularly will significantly increase your chances for success.

My Goals	
What I will accomplish:	Date to be completed:
Goal 1:	Date:
Goal 2:	Date:
Goal 3:	Date:
Goal 4:	Date:
Goal 5:	Date:
Goal 6:	Date:

4. Defining Your Activities

“Critical Activities” are the steps or actions you will implement to achieve your goals. Well defined activities help focus your time on things that matter most in getting where you want to go. You may need to eliminate other activities from your life that take up time, but have no impact on achieving your goals. Here are some positive examples of critical activities for producing specific goals.

Goal: Have 3 new distributors in place by the 15th of this month.

Critical Activities:

Follow up with all potential distributors I met with during the past 30 days
Talk to 10 new people each day that I meet during my normal activities
Call the next 30 people on my master contact list and invite them to a group meeting
Obtain commitments from 10 people to attend a group information session
Meet with 10 people personally and invite them to join our business

Goal: Have 5 talented advisors in place by the end of the month.

Critical Activities:

Determine the specific areas where I need help in order to grow my business
Use my network to identify several individuals who could help in each area
Contact my first choices for each area of expertise and ask if they will mentor me
Hold an initial meeting with each member of my advisory group by the end of the month

It is now time to create an execution plan for your new business opportunity. First, write down the goals you established for your business in the previous exercise. Next, list the critical activities or steps you will follow to achieve each of your goals. Be sure to include dates for accomplishing each goal and activity. Complete one of these execution plans every month. Revisit and revise it as needed based on changing conditions and new opportunities.

In sum, to be successful you need to: (1) know why you are in business, (2) create a vision of where you want to go, (3) set regular goals to get there, and (4) create action plans to achieve your goals. As you continue to repeat the process of setting goals, creating action plans, and achieving your goals, your confidence will grow and your business will expand.

My Execution Plan	
Goal 1:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	
Goal 2:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	
Goal 3:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	

Goal 4:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	
Goal 5:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	
Goal 6:	
Date:	
Critical Activities to Accomplish this Goal:	
1.	
2.	
3.	
4.	
5.	