

Organization

Objective: To help consultants set up an organized system for their products and business paperwork.

1. Supply checklist for setting up your office. (Review sample list on page 1.3 of your Career Essentials)

2. Tips for setting up your office:

- a. Make your office portable.
- b. Make sure your answering machine message sounds professional.
- c. Keep a pad and pencil by the phone so you are prepared for phone calls.
- d. Keep sales tickets and look book handy along with a calculator.

3. Filing system suggestions. Review page 1.4 of Career Essentials)

Applause Magazine Goal Setting Booking/ Coaching
Product Replacement Forms Sales Tickets
Credit Card fee slips Color Cosmetic Info. Hostess Info
Skin Care Info Product order packing slips Legal Info
Tax Info/ Statements Consultant order forms
Limited Edition Info Team-Building Info Correspondence
Preferred Customer Time Management Unit Members
Customer Profiles Money Management Maps
Unit Newsletters Weekly Accomp Sheets E-mail Lists
Customer Service Price Comparisons Weekly Plan Sheets
Product Info Brochures Scripts

4. Tips for storing and organizing product. (Add suggestions of your own)

- a. Organize inventory by product category and formula.
- b. Use the first in – first out rule in selling
- c. Do not store where product will be exposed to excessive heat or cold
- d. Make sure to have items easily transportable for classes and trunk shows
- e. Create ready make sets for trunk shows

5. Organize Go Book and samples for easy access to give to potential customers. (Always include look books, sales tickets, business cards, ink pen, & calculator along with facials on the go sample)
Take your Go Book with you!

6. You might want to discuss a system to put in place to keep track of customers and potential team member. This can be a paper system

or computer software tracking system like Microsoft Outlook.
Give examples of how you use your system for follow up.
(Develop an online e-mail contact list for bi-monthly e-mails)