



Meeting Check List

A. Agenda (W3-Agenda.doc)

B. Attendance Form (form4)

C. Leads Record Forms

Have at least 75 Lead Record Forms for each meeting. Don't forget to save the yellow copies for accountability.

D. Presentation Schedule (Access Query 74-Presentation Schedule)

E. Guests Folders

Verify if you do not the attendees that this is their first meeting, (they could be visiting from another group) then give them a packet.

F. Calendar Binder (www.eliteleads.com/eventscalx.shtml) [x=your territory number]

Verify all materials are current. Check to see all mailed in material is in the first meeting folder

G. Tracking Form (form7)

Hand out the Meeting Tracking Form so that it will be easier for everyone to remember what each person is looking for. You will probably have to explain it.

H. Newsletters

Count the number of groups for the week and make sure there are at least 20 newsletters for each group.

I. Invoice (Access)

Be sure to give the guests the invoice with their name - there is a blank invoice just in case a guest attends that I'm not aware of. Tell them that I will call within a week to answer any questions that they might have and stress how you are looking forward to working with them in the group.

J. Wrapup

Be sure to save everything in the folders and please email me with the results:

How many attended

How many leads

How many guests

K. Fax copies of Attendance and Agendas to Home Office each Friday

Thank you!