

# Computer Preparation For Meetings



# Elite Leads Business Development

## Computer Preparation

5.1

On Monday, prior to the next week's meetings, you'll need to run the "Fee Report, (A7) to know who to send the "Email". There are two kinds of emails you'll be sending. One to guests for the following week's meeting and a reminder notice to the members who missed the previous meeting.

### A. Run "Fee" Report

To Open the Database in Access:

Click [✓] Start, ✓ Program

✓ ✓ Microsoft Access from the Menu

✓ ✓ to open "Elite"

✓  at the top corner to make the frame larger

✓ 07-Fee Report ✓ ✓ Design

At the bottom of the form click on the slide bar until you see the field "Code". On the 5th "criteria" line, enter the group number, make sure that you enter it between the quotes "xx\*"

✓ View to go to Datasheet View

✓ File ✓ Print, ✓ OK

Run a report for each group for the next week and the current week. ✓ Close ✗

### B. Email Reminders

Email notices are sent the week before the meeting.

Click on Design Queries in Access 07-Email List.

✓ Design

At the bottom of the form click on the slide bar until you see the field "Code". On the 5th "criteria" line, enter the group number, make sure that you enter it between the quotes "xx\*"

✓ View to go to Datasheet View

✓ Tools ✓ Office Links, ✓ Analyze with Excel, which will take you straight to the Excel Spreadsheet (after the first time the message "07-Email List already exists, do you want to replace file? ✓ Yes)

✓ File, ✓ Save As, ✓ ✓ Save as type: ✓ CSV ✓ Save In:  
✓ Desktop ✓ ✓ My Documents, ✓ Save, ✓ Yes Message appears  
"Message appears: "07-Email List may contain features that are not compatible with CSV, Do you want to keep workbook in this format?  
✓ Yes, ✓ File ✓ Save

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*"The foolish man seeks  
happiness in the distance, the  
wise grows it under his feet.*  
- James Oppenheim

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- ✓ Outlook Address Book,
- ✓ Main Identity, Delete all addresses
- ✓ File, ✓ Import, ✓ Other Address Book, ✓ ✓ Text File
- ✓ Browse, ✓ Look In Desktop, ✓ My Documents
- ✓ File Type CSV, ✓ 07-Email List.csv,
- ✓ Open, ✓ Next, ✓ Finish, ✓ OK,
- ✓ Close Address Book Tool.

- ✓ Internet Browser and Open <http://www.eliteleads.com/00101.htm>, ✓ File, ✓ Send by Email.
- At the email, ✓ Cc:
- ✓ Your Name to To:> and then the first name, scroll to last name, while holding the control and shift keys to highlight all and send to Bcc:> ✓ OK, ✓ Send -
- ✓ Send if some pictures are not available.

### C. Absent and Reminders Calls

On Monday morning, you will use the "08-Fee Report" (A07) again to place absent and reminder calls for guests and members for the current week's meetings.

In an ideal world everyone would remember where they should be and you wouldn't need to call to remind them. But in the real world people are over committed and have a great deal of responsibilities, so it is critical to the success of your attendance ratio to make these calls to everyone on each list.

Highlight over the top of the date if the attend date was the previous month and bracket the date to the right if the date is this month. Count the number of previous and current month's guests (4/5 = 4 guests from last month, 5 guests this month.)

Absent: Anyone who missed the previous meeting:

*"Hi, this is Sharyn from Elite Leads, we missed you at the last meeting. I'm calling to remind you about the meeting this week on Tuesday at 9 am."*

Then check off the their name in a bright marker, mark a "Y" if you know they'll attend, "N" if not in the Extension Field.

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"You must be the change you wish to see in the world."  
- Mahatma Gandhi

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Reminders: Anyone who owes money, whether a member or a guest:

*"Hi this is Sharyn from Elite Leads, I'm checking to make sure you received the fax last week and have the directions for the meeting on Tuesday at 9 am."*

If they are renewing, I call the second meeting of the month if they have not brought the check to the first meeting.

*"Hi this is Sharyn from Elite Leads, I'm calling to remind you about the meeting on Tuesday. Don't forget, your Promotional Fees are due. Would you like to put it on your credit card?"*

#### **D. The Roster**

While I'm making my calls, I print out all of the Rosters and invoices for the week. I separate them with a bright color sheet of paper and keep them in the order of the meetings.

Microsoft Access should still be open.

- ✓ Queries
  - ✓ 26-Elite Members-Guests Roster ✓ Design
  - ✓ Slider bar until you see the "CODE" Field, Type "01\*", in the 5th line down at "CRITERIA"
  - ✓ View to go to Datasheet View
  - ✓ File ✓ Page Setup, ✓ Page ✓ Landscape ✓ OK
  - ✓ File ✓ Print, for your first meeting run 2/3 the number of confirmed guests you expect, thereafter an average of 5, ✓ OK then ✓ Close ✗
- Or run all Rosters for each group, especially because the landscape mode has to be set each time.

#### **E. The Invoice**

The Invoice is a 2-step process

Microsoft Access should still be open.

- ✓ Queries
- ✓ 17-Invoice ✓ Design
- ✓ Slider bar until you see the "CODE" Field, Type

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"One machine can do the work of fifty ordinary men. No machine can do the work of one extraordinary man."  
- Elbert Hubbard

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"01\*", in the 5th line down at "CRITERIA"

- ✓ View to go to Datasheet View
- ✓ File ✓ Save, ✓ Close ✗ ✓ Reports ✓ 17-Invoice
- ✓ Preview ✓ Print ✓ Close ✗

## F. The Presentation Report

You probably won't need to print this report until your third or fourth month.

Microsoft Access should still be open.

Refer to the Agendas from the past meetings if you haven't kept up the Presentation Report. At the "PRESENTATION DATE" Field, enter the latest date in which they did their last presentation.

- ✓ Queries
- ✓ 41-Presentation Report ✓ Design
- ✓ Slider bar until you see the "CODE" Field, Type "01\*", in the 5th line down at "CRITERIA"
- ✓ View to go to Datasheet View

Enter each date of presentation already made by members, then with ✓ in the "PRESENTATION DATE" Field and ✓ A to Z to put them in order

- ✓ Printer Icon ✓ Close ✗

Presentations are done by members only, unless a professional organization like Tom Hopkins, Brian Tracy, etc. have offered to do a mini program for the groups.

Refer to the "Presentation" (A41) Report for the next scheduled presenters. Members should have attended two meetings prior to their presentation. That allows them to be more comfortable and get to know some of the members. If there are more than two members who have been at two meetings, choose by the first one that paid.

## G. The Agenda

Click [✓] Start to Open the Microsoft Word:

- ✓ File then ✓ Open
- ✓ ✓ "formW3-Agenda.doc"

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*"Happiness is not a destination. It is a method of life."*  
- Burton Hills

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Change the date for the next meeting at both the "Next Presenters" and Section "X. Thanks for Attendance". Place in the meeting folder (Refer to Section 8).

- ✓ File, ✓ Save
- ✓ Printer Icon ✓ Close ✗

After your first meeting, you'll refer to the "Elite I" Binder and the previous meeting's Agenda to find who the presenters are. Enter their names.

### H. The Attendance Sign-in Form

Run enough of the Attendance forms (form4-Attendance.p65) on the first day of the month (refer to Section 8 for all forms to be run and assembled prior to first meeting). Keep the Attendance forms in a separate folder in your meeting briefcase, or to serve as a reminder place the form behind the Agenda in the meeting folder.

### I. The Guest Packets

The general rule is that you will have a 50% showing for those who say they will actually attend. So, let's assume you have 100 guests who have confirmed that they will be there during the month. Plan on seeing 50. You will need to prepare a minimum of 50 guest packets.

Click [✓] Start to Open the Microsoft Word:

- ✓ File then ✓ Open
- 1. ✓ ✓ "formW8-Policies.doc"
- ✓ File, ✓ Save
- ✓ Print "50" ✓ OK, ✓ Close ✗
- ✓ File then ✓ Open

- 2. ✓ ✓ "formW10-Welcome.doc"
- ✓ File, ✓ Save
- ✓ Print "50" ✓ OK, ✓ Close ✗

Click [✓] Start [✓] Programs

- ✓ Adobe ✓ PageMaker 6.5 ✓ PageMaker6.5 from the Menu
- ✓ "File"; ✓ Open

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*"Men are not prisoners of fate, but only prisoners of their own mind."*

- Franklin D. Roosevelt

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3. ✓ "form13-Explantation.p65"

✓ Print, type "25" for the number of copies (that will give you 50 copies),

✓ Range, type 1 (to print Page 1 only, Page 2 will be printed on the back.) ✓ Print

Turn the forms usually right side up head toward the back of the printer.

✓ Print, type "25" for the number of copies (that will give you 50 copies),

✓ Range, type 1 (to print Page 1 only, Page 2 will be printed on the back.) ✓ Print

✓ "File"; "Save"; ✓ Close

Cut the forms to 3 1/2" wide and fold in half, then half again, then the last

4. ✓ "File"; ✓ Open ✓ "form5-brocure.p65"

✓ Print, type "17" for the number of copies (that will give you 50 copies), ✓ Print

✓ "File"; "Save"; ✓ Close

Cut at 3 5/8" and 7 5/16"

5. ✓ "File"; ✓ Open ✓ "form6-Free.p65"

✓ Print, type "17" for the number of copies (that will give you 50 copies), ✓ Print

✓ "File"; "Save"; ✓ Close

I have tape on the paper cutter at 3 5/8" and 7 5/16" to make it easy to remember where to cut forms that I print 3-up.

6. ✓ "File"; ✓ Open ✓ "form7-Tracking.p65"

✓ Print, type "50" for the number of copies, ✓ Print

✓ "File"; "Save"; ✓ Close

7. ✓ "File"; ✓ Open ✓ "form8-Power Partner.p65"

✓ Print, type "50" for the number of copies, ✓ Print

✓ "File"; "Save"; ✓ Close

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*"There are no mistakes, no coincidences. All events are blessings given to us to learn from."*

- Elizabeth Kubler-Ross

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Click [✓] Start from the Menu

8. ✓ Netscape ✓ Netscape Navigator

You should have Elite Leads at you home page

✓ Resources ✓ Organizations ✓ Your Territory

✓ "File" ✓ Print ✓ Page "1" to "1" ✓ Number of  
copies "50" ✓ OK

### **I. Assembling the Guest Packets**

Assemble the packets for the meetings on the first Monday of the month. You'll avoid the stress of having to do them last minute or forgetting to prepare ample packets. PMxx refers to PageMaker form number. Do not make copies. Print originals only. This is a quality issue. Everything that we prepare for Elite Leads should represent the very best quality that is possible. This is the order in which to assemble them.

- (R) Lead Tracking Forms
  - Leads Tracking Explanation (PM13)
  - Vinyl Bus Card Sheets
  - Free Business Times (PM6)
- (L) Elite 1-panel brochure (PM5)
  - Welcome (W10)
  - Power Partner List (PM8)
  - Organization List (website-Resources)
  - Policies (W8)

Meeting Tracking (PM7)- Loose

Ample Members-Guests Rosters (A26) for each guest (run 5 unless you have a large number of guests attending, you can give the extras to members as an update).

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*"Obstacles are what you see  
when you take your eyes off  
your goals."*

- Brian Tracy

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