

Meeting Check List



Elite Leads Business Development Meeting Check List

8.1

FIRST MEETING CHECK LIST

A. Prior to the meeting:

You sent the Email Notices 7-10 days prior to meeting.

Use the Fee Report (Access: 07-Fee Report) and call on Monday morning.

Call each person on the list on Monday of the week of the meeting. Call if they are new or if they missed the previous meeting, to remind them of the meeting, get a verbal commitment for attendance. Mark each call with your felt tip pen.

B. Elite Meeting Folders

Use the plastic folder to keep each meeting material together. Check to make sure each page is prepared:

- Invoice (17-Invoice)
- Agenda is updated (formW3-Agenda.doc)
- Blank Attendance Form (form4-Attendance.p65)
- Current Fees Report (07-Fee Report)
- Presentation Schedule (41-Presentation Schedule)
- Business card pages with the cards you've collected.

C. Guest Folders

- (R) Lead Tracking Forms
- Leads Tracking Explanation (P13)
- Vinyl Bus Card Sheets
- Free Business Times (P6)
- (L) Elite 1-panel brochure (P5)
- Welcome (W10)
- Power Partner List (P8)
- Organization List (website:Territories)
- Policies (W8)
- Loose Meeting Tracking (P7)
- Ample Members-Guests Rosters (26-Members-Guest Roster) for each guest (run 5 unless you have a large number of guests attending, you can give the extras to members as an update).

Networking (-in) n.

The developing of contacts or exchanges of information with an information network, as to further a career.

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8.2

D. Leads Record Forms

Have at least 75 Lead Record Forms for each meeting.

E. Calendar Binder

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

F. Leads from requests

Check to see if there are leads forms filled out for members and run the list (Access Queries:18-Industry List for Leads)

G. Newsletters

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

H. Print Meeting Check List

Click [✓] Start to Open the Microsoft Word:

✓ File then ✓ Open

✓ ✓ "W2-Meeting Check List"

✓ File, ✓ Save

✓ Printer Icon ✓ Close ✗

"Twenty years from now you will be more disappointed by the things that you didn't do than by the ones you did do."
- Mark Twain
