

Lead Generation and Marketing:

- ☐ Outreach planned (min 3 hours and 15-20 leads) _____
- ☐ Lead Box collection (Mon and Thurs) _____ Boxes _____ Leads _____
- ☐ Referrals point of sale support person / referral table / promo _____ obtained
- ☐ Referral promotion (organise for quarterly big promos) _____
- ☐ Charity card out (one club a quarter) loc: _____
- ☐ RE vouchers out and topped up loc: _____
- ☐ Local area marketing opportunities: _____
- ☐ Colouring in competitions out at: _____
- ☐ Pulse magazines out at: _____
- ☐ Fernie appearances at: _____
- ☐ Marketing. Tool kit review, current posters up, A frame current, social media pic current

Sales

- ☐ Sales _____ Onboarding _____ Average member value _____ Referrals _____
- ☐ Sales Flexis _____% (target 30% or less) 12m _____% 18m _____% Add ons _____%(target 30%)
- ☐ Total member number _____ Growth _____ Cancellations _____ %
- ☐ Total the sales board for the week and reallocate sales not obtained onto future weeks
- ☐ Sales wins and work ons for the week ahead. Set targets for the week.
- ☐ Sales Items. Review Amanda's Monday email and review tips, statistics and webinar dates.
- ☐ Lead calls checked (check notes in CRM and use flow chart in sales manual)
- ☐ Most common objection on phone or in tour last week: _____
- ☐ Biggest sales issue this week: _____
- ☐ Training video required this week: _____
- ☐ Role play / live training topic of the week: _____ Day: _____
- ☐ Cancellations and saves. Review retention _____% and people that need issues solved to save.

Social Media:

- ☐ Social media review, plan for the week what's needed.
- ☐ Discuss social ads running: _____
- ☐ Reel, story or post a day
- ☐ Review Canva for videos or assets to post
- ☐ Take down any men in club posts from last week / recent
- ☐ Check stats of post engagement
- ☐ Post any promos or events