

# Downline Task Tracker – Start With Heart

close<sup>to my</sup>Heart®

*“Early Success Increases Retention”*

Downline Name:

Contact Information:

Sign-up Date:

Expected Delivery Date for Kit:

## STTT Deadlines:

Level 1:

Level 2:

Level 3:

## Start With Heart

*Each Start with Heart newsletter contains a to-do list. Write the date your Downline receives each newsletter to help you keep track of what she is learning so you can ask her relevant questions and assess her progress.*

SWH #1 received:

SWH #4 received:

SWH #7 received:

SWH #2 received:

SWH #5 received:

SWH #8 received:

SWH #3 received:

SWH #6 received:

SWH #9 received:

## Issue #1 To-do List

Date received:

- ☐ 1. Watch the Welcome video.
- ☐ 2. Watch the Mission Statement video.
- ☐ 3. Make sure you have your Upline's contact information.

## Issue #2 To-do List

Date received:

- ☐ 1. Watch the Straight To The Top video, read the FAQ and review the flyer.
- ☐ 2. Set up your OBA.
  - Watch the OBA Tutorial.
  - Log in to Online Office by going to [www.closetomyheart.com](http://www.closetomyheart.com) and clicking the “Consultant login” link in the upper right corner. If you chose not to set up your OBA upon enrollment, you will be prompted to do so before proceeding.
  - Your first and last name make a great URL that is easy to remember, but consider getting creative and using this field as a way to identify what is special about your business. Your goal is to come up with something short and easy to remember but that also communicates something about who you are and what you have to offer.
  - Your URL may not use CTMH, Close To My Heart, or any other trademarks.

- ☐ 3. Check the status of your New Consultant Kit order.
  - Go to Business Management > Reports > Order History. Then select the current month, and click on “Get Report.” Double-click on your New Consultant Kit order. Check back later for a tracking number if you don’t see one posted.
  - Keep in mind there is a 2–4 business day in-house turn-around time on all orders. New Consultant Kits are typically processed within 1–2 business days.
- ☐ 4. Sign up for Direct Deposit.
- ☐ 5. Watch the Online Office video.
- ☐ 6. Watch the Order Entry video.
- ☐ 7. Review the Consultant Manual.

### Issue #3 To-do List

**Date received:**

- ☐ 1. Prepare for your first Home Gathering.
  - Watch the video “What Are the Benefits of Holding a Home Gathering?”
  - Choose a date for your Home Gathering. Make sure it’s before the date you chose for your EZ Invite Online Gathering, but give yourself enough time to order any necessary supplies.
  - Choose the creative project for your Gathering using the Creative Insider resource.
  - Order supplies needed for the creative project using the free Select Product Credit you received when you signed up to be a Consultant. Refer to the New Consultant Kit Shopping List to help you know which products to order, based on the Creative Insider Project you are going to make.
  - Tell everyone about your new business, OBA, and scheduled Home Gathering.
  - Review steps 1 through 3 of the Home Gathering Training Course located under Training & Events > Training Courses > Business Basics > Home Gathering.
- ☐ 2. Set Up an EZ Invite Gathering.
  - Watch the EZ Invite™ video for a helpful step-by-step walk-through of this process.
  - Log in to Online Office, and click “Order Entry.” Select the EZ Invite Order type. For this first order, leave the “EZ Invite Home Gathering” button and the “Publish on my OBA” box selected. Enter a Gathering Name—make it exciting! “My CTMH Grand Opening,” or something similar would work great. Select the Gathering date and time that you’ve decided on for your first Home Gathering. Press the “Select a hostess” button and enter your own information. Follow the instructions to finish setting up your order.
- ☐ 3. Set an appointment to observe your Upline at a Gathering. If she lives too far away, conduct a long-distance interview.
- ☐ 4. Check out CTMH TV, the CTMHC Corp YouTube Channel and the Make It from Your Heart blog.

### Issue #4 To-do List

**Date received:**

- ☐ 1. Watch the New Consultant Kit video.
- ☐ 2. Continue to prepare for your Home Gathering.
  - Review steps 4 through 7 of the Home Gathering Training Course located under Training & Events > Training Courses > Business Basics > Home Gathering.
  - Pick a theme for your Gathering. Plan your decorations and refreshments.

- Send personalized invitations to at least 20 people. The more people you invite, the more quickly word will spread about your new business! If you have time, make invitations that correspond with your theme.
- Once you receive the products you ordered for the creative project, pre-cut the paper, and make a sample of the card or layout you've selected. You'll be able to show it to the guests at your Gathering and easily walk them through replicating the project.

- ☐ 3. Learn about our partnership with Operation Smile™.
- ☐ 4. Look up your personal Straight To The Top deadline dates in your Personal STTT report, so you can stay on track to meet your goal.

## Issue #5 To-do List

### Date received:

- ☐ 1. Finish preparations for your Home Gathering.
  - Review steps 8 and 9, as well as the “During the Home Gathering” sections of the Home Gathering Training Course located under Training & Events > Training Courses > Business Basics > Home Gathering.
- ☐ 2. Learn the Home Gathering Strategy.
  - At the Gathering, make it a goal to have 2-3 people sign up to host their own Home Gatherings; also share the business opportunity with at least one guest.

## Issue #6 To-do List

### Date received:

- ☐ 1. Submit Customer Orders.
  - Log in to Order Entry, and click “Manage” next to your EZ Invite™ order. Enter the orders as received from your customers. Double-check to make sure everything is accurate. Feel free to contact customers if you have questions or if you notice that they have qualified for a campaign.
- ☐ 2. Practice great customer service so your customers will keep coming back for more!
- ☐ 3. Make sure you have at least 2-3 bookings on your calendar.
  - Hopefully these bookings came from your Home Gathering. If you weren't able to schedule additional Gatherings, pick up the phone and start calling people you think would be excited for the chance to host a party.
- ☐ 4. Coach the hostesses of your upcoming Gatherings to make sure they feel prepared and confident.
- ☐ 5. Watch the video “Where Do I Find Customers, Hostesses, and Team members?”

## Issue #7 To-do List

### Date received:

- ☐ 1. Order business supplies and tools you'll need for future events.
- ☐ 2. Watch the Featured Paper Collection video.
- ☐ 3. Review your Straight To The Top deadline dates in your Personal STTT report, so you can stay on track to meet your goals. Schedule any additional events needed to meet your STTT goals for the next level.
- ☐ 4. Keep learning from the wealth of training resources in Online Office, such as the Training Videos and Listening Library conference calls.

## Issue #8 To-do List

Date received:

- ☐ 1. Expand your online presence. Share your artwork, events, special deals, and exciting news on social media. Create a personal blog or website.
- ☐ 2. Set Gathering goals. Set specific goals regarding how many bookings you want on your calendar for the next three months. Aim for at least one event per week. Try to book 2-3 new Gatherings at each Home Gathering you hold.
- ☐ 3. Identify 8 or more Customers that might be interested in joining a club.
  - Advertise clubs at all your Gatherings, and collect contact information of interested people.
  - Once you have your first interested person or people, set a date to hold your first club.

## Issue #9 To-do List

Date received:

- ☐ 1. Set commission goals. Determine what it is that you'd like your business to pay for, and determine how much you would need to earn each month. Then, look at the compensation plan, and determine how much you would need to submit in personal sales to earn that amount.
- ☐ 2. Review steps 1 through 5 in the Sharing the Opportunity Training Course found in Online Office under Training & Events > Training Courses > Team Building > Sharing the Opportunity.
- ☐ 3. Make a list of at least 5 people who would make good Team members; start building your relationship with them. When you feel they might be receptive, contact them to see if they are interested in becoming part of your Team.
- ☐ 4. Use the Opportunity Gift as a creative way to share information about the business opportunity. Make three Opportunity Gifts and take them to your next Home Gathering. Give them to anyone who shows interest in the business or who you think has potential.
- ☐ 5. Keep up with the latest news, events, and campaigns by reading the Weekly Corporate Update and the Marquee Messages.
- ☐ 6. Review your calendar regularly to keep track of your availability and appointments. Book additional events as needed to fill your calendar.