

# Keys to Success

## Getting Organized

1. Weekly Accomplishment Worksheet
2. Business Tracking Register
3. Expense Sheet for Company
4. Getting Organized
5. Order Boulevard (BLVD) Inventory Software
6. Tax Information



Dear Sales Director:

**I would like more information about the following areas:**

Booking \_\_\_\_\_ Obtaining Reorders \_\_\_\_\_  
 Coaching \_\_\_\_\_ Closing My Classes \_\_\_\_\_  
 Sharing The Opportunity \_\_\_\_\_ Skin Care Class Procedure \_\_\_\_\_  
 Telephone Sales \_\_\_\_\_ Customer Service \_\_\_\_\_  
 Preferred Customer Program \_\_\_\_\_ Business Management \_\_\_\_\_  
 Other \_\_\_\_\_

**Next Week's Goals**

Amount of Sales \$ \_\_\_\_\_  
 Number of Classes \_\_\_\_\_  
 Number of Facials \_\_\_\_\_  
 Number of Bookings \_\_\_\_\_  
 Number of Interviews \_\_\_\_\_  
 Number of Customer Calls \_\_\_\_\_

**Preferred Customer Program Summary (Optional)**

**Spring Summer Fall Holiday** (circle one)  
 \_\_\_\_\_ No. of customers enrolled in **current** Preferred Customer Program  
 \_\_\_\_\_ No. of customers contacted this week  
 \_\_\_\_\_ No. of orders  
 \$ \_\_\_\_\_ Total Preferred Customer Program sales this week

**This Week's Hourly Earnings**

Your Estimated Weekly Gross Profit \$ \_\_\_\_\_  
 +  
 Hours Worked \_\_\_\_\_  
 =  
**Total Earned Per Hour** \$ \_\_\_\_\_

**New or Prospective Team Members**

INTERVIEWED (✓)	RECRUITED (✓)	NAME	COMPLETE ADDRESS	TELEPHONE

# BUSINESS TRACKING REGISTER

Month/Year \_\_\_\_\_

Monthly Budgeted Expenses \_\_\_\_\_

Date	Reason	Deposit =		Inventory 50%	Sales Aids 5%	Pref. Customer 5%	Bus. Income 40%
		Sales (without tax)	Sales Tax				
	Balance Forward						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						

BUSINESS TRACKING REGISTER

May 2005

\$75

Month/Year \_\_\_\_\_

Monthly Budgeted Expenses \_\_\_\_\_

Date	Reason	Deposit =		Inventory 50%	Sales Aids 5%	Pref. Customer 5%	Bus. Income 40%
		Sales (without tax)	Sales Tax				
	Balance Forward	500.00	41.25	250.00	25.00	25.00	200.00
5/2/05	+541.25 Sales	500.00	41.25	250.00	25.00	25.00	200.00
	Total	375.00	30.90	187.50	18.75	18.75	156.00
5/9/05	+405.93 Sales	875.00	72.15	437.50	43.75	43.75	350.00
	Total	-	-	-	-	-43.75	-
5/15/05	-43.75 PCP	875.00	72.15	437.50	43.75	-	350.00
	Total	750.00	61.88	375.00	37.50	37.50	300.00
5/16/05	+811.88 Sales	1,625.00	134.03	812.50	81.25	37.50	650.00
	Total	-	-134.03	-812.50	-63.50	-	-8.35
5/17/05	-1,010.03 Whsl Order	1,625.00	-	-	17.75	37.50	641.65
	Total	-	-	-	17.75	-	-157.25
5/18/05	-175 Seminar	1,625.00	-	-	-	37.50	484.40
	Total	1,000.00	82.50	500.00	50.00	50.00	400.00
5/23/0	+1,082.50 Sales	2,625.00	82.50	500.00	50.00	87.50	884.40
	Total	530.00	43.73	265.00	26.50	26.50	212.00
5/30/0	+573.73 Sales	3,155.00	126.23	765.00	76.50	114.00	1,096.40
	Total	-	-	-	-	-	+72.00
5/31/05	+72.00 Commission	3,155.00	126.23	765.00	76.50	114.00	1,168.40
	Total	-	-	-	-	-	-675.00
5/31/05	-675.00 Salary	3,155.00	126.23	765.00	76.50	114.00	493.40
	Total	-	-	-	-	-	-147.00
5/31/05	-147.00 Mo. Exp.	3,155.00	126.23	765.00	76.50	114.00	346.40
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						
	Total						

(1428.13  
Actual  
Balance)

Please note: The Company grants all Mary Kay Independent Beauty Consultants a limited license to duplicate this document in connection with their Mary Kay businesses. This item should not be altered from its original form.

# GET ORGANIZED

## Supplies

- ✓ Bank Box (Office Max special order part no. GLW96GRE; \$14.79 ea.)
- ✓ Mini File Folders
- ✓ Monthly dividers for bank box
- ✓ Alphabetical dividers for bank box
- ✓ One 2 ½" 3-ring binder
- ✓ Tabs for binder
- ✓ Accordion file (with monthly tabs) or several 3-whole-punched plastic envelopes (Target)
- ✓ 3-slot desktop mail organizer

## New Customer Profile

1. Enter customer in My Customer or Preferred Customer database on MK InTouch
2. File top sheet of profile under birthday month in bank box
3. Label a mini file for that customer
4. Note on the inside of the folder anything you want to remember each time to talk to that person
5. Make a note of any follow up in your date book (note follow up on the right side of the back of the profile as your closing with your skin care class guests)

## Customer Receipt

1. Enter the order in your order form to replace your inventory
2. Enter the sale on your Weekly Accomplishment Sheet
3. Attach top copy to your WAS
4. Give the Customer Copy to the customer
5. If the sale needs additional action, file the bank copy in the appropriate slot of your desktop mail organizer (see below); if the sale is complete, file the bank copy in their file and file it in the bank box

## Desktop Mail Organizer

1. If the sale requires delivery, file the bank copy of the sales ticket in the first slot
2. If the sale required collection of payment, or if you are waiting on someone to return product they want to exchange, file the bank copy in the middle slot
3. File receipts of loans or trades with other consultants, along with your current order form and WAS, in the third slot

# GET ORGANIZED *continued*

## **3-Ring Binder**

1. Label tabs for Demos, Gifts, Personal Use, Mary Kay Order Receipts (wholesale orders), PCP, Commission Statements and WAS (or you can use 3-wholepunched plastic envelopes for all or some of these)
2. Three-hole punch a sheet of paper behind each tab for demos, personal use and gifts; each time you use a product for any of these purposes, enter it onto the log. Enter the item name, the purpose of use, retail amount and unrecoverable sales tax.

## **Accordion File/Plastic Folders**

1. Use the expense tracking register, either quarterly as designed or one for each month
2. At the end of each month or quarter, total the receipts in each category and either file it in the appropriate month of your accordion file or file it with your receipts for the quarter and start a new plastic envelope

## **Important Business Forms**

1. Weekly Accomplishment Sheet
2. Business Tracking Register
3. Expense Tracking Register
4. Weekly Plan Sheet

