

THE BASIC 5 - DIAGNOSTIC EFFICIENCY ASSESSMENT

The Basic 5 Starts With You!

LEAD BY EXAMPLE

The Basic 5 Diagnostic Efficiency Assessment is a comprehensive evaluation of how well you and your team are implementing fundamental business activities and practices. Completion of this assessment will enable you to identify strengths and weaknesses within your business and target areas for improvement. By prioritizing business activities and practices (weakness to strength) you will be able to measure, monitor, adjust and control on a daily, weekly, monthly and yearly basis. The overall objective is to master these fundamental practices and activities so that they become a matter of habit. Learning, implementing, and ultimately mastering the Basic 5 has remained the key success factor to the growth of each and every UnFranchise® business.

It is imperative that you conduct this personal and team assessment honestly and accurately in order to obtain the full benefit of this activity. This assessment is critical to identifying where you need to invest your quality time.

Basic 5 Scores: Transfer personal and team totals from each section and multiply to obtain respective scores.

Developing Attitude and Knowledge: _____ Total x 1.087 = _____ Personal Points

_____ **Total x 1.087 = _____ Team Points**

Goals & a Goal Statement: _____ Total x 1.67 = _____ Personal Points

_____ **Total x 1.67 = _____ Team Points**

Retailing: _____ Total x 1.79 = _____ Personal Points

_____ **Total x 1.79 = _____ Team Points**

Prospecting / Recruiting / Sponsoring: _____ Total x 1.92 = _____ Personal Points

_____ **Total x 1.92 = _____ Team Points**

Follow-Up & ABC's of Building Depth: _____ Total x 1.92 = _____ Personal Points

_____ **Total x 1.92 = _____ Team Points**

Total Personal Points: = _____ ÷ 500 = _____ % Personal Score

Total Team Points: = _____ ÷ 500 = _____ % Team Score

Name: _____ MA/ID# _____

Rate each one: 0 = Do not do yet, 1 = Seldom do, 2 = Occasionally do, 3 = Do often, but not consistently, 4 = Do all the time/have mastered. It is a habit and second nature.

1. DEVELOPING ATTITUDE AND KNOWLEDGE

Personal Team

- _____ _____ **DO YOU TREAT THIS LIKE A BUSINESS?** - Not a hobby, program, deal, club, etc.
- _____ _____ **CAREER MANUAL - READ IT, LEARN IT** – Read 15 minutes per day. (Part 1 and Part 2)
- _____ _____ **UnFranchise Owner Magazine** – Read cover to cover.
- _____ _____ **YOUR UNFRANCHISE® BUSINESS ACCOUNT** – Are you familiar with its many services and functionality?
- _____ _____ **SPECIALIZE IN A STORE** – Know the benefits, special features, price justification and merchandising techniques.
- _____ _____ **SHOP.COM** - Mini Websites; Isotonix, Motives Cosmetics, Getconquer.com, Global.SHOP.COM – Are you familiar with their many services and functionality?
- _____ _____ **A MINIMUM OF FOUR AUDIOS PER MONTH (LISTEN, LEARN, PROMOTE)**
- _____ _____ **BASIC 5 TRAINING (B5)** – Attend or conduct once per quarter. Listen to B5 audios.
- _____ _____ **WEEKLY COUNCILING WITH SENIOR BUSINESS PARTNER FIRST 90 DAYS**
- _____ _____ **LOCAL SEMINAR** – Pre-purchase tickets. Sell Tickets. (Minimum of three)
- _____ _____ **UNFRANCHISE BUSINESS PRESENTATIONS PER MONTH** – Attend and *bring* two new people.
- _____ _____ **READ 15 MINUTES PER DAY** – New material each week. Business, sales, or leadership material.
- _____ _____ **ASSOCIATE WITH POSITIVE, SUCCESSFUL PEOPLE**
- _____ _____ **ECCT TRAINING** – Attend or conduct at least once per year.
- _____ _____ **GETTING STARTED GUIDE AND ACTION PLAN FOR SUCCESS** – Review with Senior Business Partner and with team.
- _____ _____ **ATTEND LOCAL, DISTRICT, REGIONAL, WORLD CONFERENCE, AND INTERNATIONAL CONVENTION** – Buy your tickets and tickets for the number of “Go Now” UnFranchise Owners you plan to sponsor.
- _____ _____ **MAKE SURE ALL “GO NOWS” and LEADERS IN YOUR ORGANIZATION PURCHASE TICKETS FOR THE EVENTS** – (Local, District, Regional, World Conference, International Convention)
- _____ _____ **NEW UNFRANCHISE OWNER TRAININGS (NUOT)** – Attend or conduct one per quarter.
- _____ _____ **TEACH AND EXPLAIN ANSWERS TO POLICIES, REQUIREMENTS, AND MANAGEMENT RESPONSIBILITY TO YOUR TEAM** – Become a teacher and a coach.
- _____ _____ **ARE YOU AND YOUR TEAM CORRECTLY ENROLLED IN UNFRANCHISE AUTOSHIP?** (UnFranchise Management System (UFMS), BV 50/100/150, and IBV 10/20/30)
- _____ _____ **COMPLETE HOME SHOPPING LIST / SHOPPING ADVISOR AND IMPLEMENT THE SHOPPING ANNUITY.**
- _____ _____ **Add all points and record personal and team totals on cover sheet.**
- Total** **Total**

Future Assignment: List answer values (0s, 1s, 2s, 3s) in ascending order on a separate piece of paper to prioritize areas for improvement.

Rate each one: 0 = Do not do yet, 1 = Seldom do, 2 = Occasionally do, 3 = Do often, but not consistently, 4 = Do all the time/have mastered. It is a habit and second nature.

2. GOALS & GOAL STATEMENT

Personal Team

- _____ _____ **DEFINE YOUR DREAM AND PURPOSE** – What is the driving reason why you are doing this business? If you cannot write it down, then you do not have it or you do not know it.
- _____ _____ **DEFINE YOUR SHORT TERM AND LONG TERM GOALS** – 5 to 10 in ascending order of attainability.
- _____ _____ **WHAT YOU WANT** – The things or lifestyle, the income required to support them, the business development centers required to qualify in order to attain the income level, the UnFranchise Level.
- _____ _____ **WHEN DO YOU WANT IT** – Exact date.
- _____ _____ **TRANSLATE IT INTO THE BUSINESS** – How many business development centers qualifying per month to earn the necessary income. UnFranchise Level?
- _____ _____ **WHAT YOU WILL GIVE UP OR OVERCOME TO ACHIEVE?**
- _____ _____ **DETAILED PLAN** – Each day, each week, each month, each year.
- _____ _____ **WRITE YOUR GOAL STATEMENT** – Refer to Career Manual
- _____ _____ **READ GOAL STATEMENT TWICE A DAY**
- _____ _____ **VISUALIZE IT REGULARLY** – The check, the UnFranchise Level, the organization, the things or lifestyle, the **UnFranchise Owner Magazine**.
- _____ _____ **PICTURES, BROCHURES, FINANCING, GO SEE IT AND FEEL IT** – Do what you would do if you were ready to get it.
- _____ _____ **TO DO LIST** – Prioritize each day before going to bed.
- _____ _____ **CHECK WHERE YOU ARE DAILY, WEEKLY, MONTHLY, AND ADJUST** – Modify statement if necessary. Meet with sponsor or Senior Business Partner regularly to review.
- _____ _____ **STRATEGIC BUILDING PLAN** – Where to work to reach team objectives in each organization. Maximize with combinations and cross-pollination. Focus on the “Go Now” UnFranchise Owners.
- _____ _____ **TICKET GOAL** – Local _____ District/Regional _____ World Conference _____ International Convention _____
- _____ _____ **Add all points and record personal and team totals on cover sheet.**
- Total** **Total**

Future Assignment: List answer values (0s, 1s, 2s, 3s) in ascending order on a separate piece of paper to prioritize areas for improvement.

Rate each one: 0 = Do not do yet, 1 = Seldom do, 2 = Occasionally do, 3 = Do often, but not consistently, 4 = Do all the time/have mastered. It is a habit and second nature.

3. RETAILING

Personal Team

_____ _____ **USE THE PRODUCT** – How many do you use? How many more could you use? People ask “What’s that?”. Opportunities present themselves. Become a product of the product. Tell your story or the story of others. Home Shopping List Shopping Advisor.

_____ _____ **SHOPPING ANNUITY.** Making a full on commitment to becoming a MA household, converting your spending into earning.

_____ _____ **UNFRANCHISE AUTOSHIP PROGRAM** – Are you exceeding the minimums for your UnFranchise level and utilizing the Excess Volume Placement?

_____ _____ **BASE 10 – BV** - Minimum production, teach it and measure it: Each UnFranchise Owners creates greater than, or equal to 400 BV/Month
(Personal use = 100 BV/Month, 10 customers @ 30 BV/Month = 300 BV) You, in addition to three UnFranchise Owners on the left, and three UnFranchise Owners on the right, each implementing Base 10 = Base 10, Seven Strong = earning \$300 per month.

_____ _____ **BASE 10 – IBV** - Minimum production, teach it and measure it.: Each UnFranchise Owners creates greater than, or equal to 200 IBV/Month
(Personal use = 15 IBV/Month, 10 customers @ 20 IBV/Month = 215 I BV) You, in addition to three UnFranchise Owners on the left, and three UnFranchise Owners on the right, each implementing Base 10 = Base 10, Seven Strong = earning \$300 per every two months.

_____ _____ **REGISTER PREFERRED CUSTOMERS** – Are all customers registered?

_____ _____ **PREFERRED CUSTOMER AUTOSHIP** - Have a minimum of 3 customers on autoship.

_____ _____ **SHOPBUDDY™** - Have 100% of you and your customers on ShopBuddy to maximize discounts and cash back

_____ _____ **MERCHANDISING TECHNIQUES** – Check the techniques you are using

- | | |
|---|--|
| _____ Trial-size Marketing | _____ Demonstrations |
| _____ Video Marketing | _____ e-Gifts |
| _____ SHOP.COM Tour | _____ Share page (E-mail and Social Media) |
| _____ Motives / TLS online parties | _____ Cashback/Free Shipping; Autoship Discounts |
| _____ Cosmetic Consultations or Clinics | _____ One-to-One Marketing – Trend Shop |
| _____ Nutri-Physical®/ Skin Analysis | _____ HSL & Shopping Advisor |
| _____ Mini Web Sites | _____ Social Networking |
| _____ ShopBuddy | _____ General Product Training with guest |

_____ _____ **HOME PRODUCT PRESENTATIONS:** Are you and your team doing these regularly? Wellness seminars, Product Previews, TLS Overviews, Motives Overviews.

_____ _____ **BUILD SHARE OF CUSTOMERS** – Multiple purchases. Develop relationship. Sustain/Maintain dialogue. Obtain feedback. Financial ability to buy more? Ordering consistently? Repeat retail customers. Home Shopping List.

_____ _____ **NUTRI-PHYSICAL® - NUTRITIONAL ANALYSIS/ SKIN ANALYSIS** - Have you utilized? Build share of customers?

_____ _____ **SHOP.COM** – A necessity, create BV & IBV, provides web presence, E-Commerce. (mini-websites)

_____ _____ **DRIVE TRAFFIC / PROMOTE YOUR WEBSITE** – Word of mouth, business cards, SHOP.COM Tour, e-Gifts, Trend Shop, Social Network, Invite A Friend Tool. Mini Product Websites, brochures, Nutri-Physical®

_____ _____ **Add all points and record personal and team totals on cover sheet.**

Total Total

Future Assignment: List answer values (0s, 1s, 2s, 3s) in ascending order on a separate piece of paper to prioritize areas for improvement.

Rate each one: 0 = Do not do yet, 1 = Seldom do, 2 = Occasionally do, 3 = Do often, but not consistently, 4 = Do all the time/have mastered. It is a habit and second nature.

4. PROSPECTING / RECRUITING / SPONSORING

Personal Team

_____	_____	NAMES OR POSSIBILITY LIST – 100 to 500 people.
_____	_____	ADD TWO POSSIBILITIES PER DAY – Habit
_____	_____	TOP 10 LIST – Those possibilities who show interest, curiosity. Decide type of approach (i.e. referral, evaluation, direct, product, audio/video)
_____	_____	ANSWER TO “WHAT IS IT?” – The best answer is your answer.
_____	_____	TWO-MINUTE COMMERCIAL – Your reason Why?
_____	_____	PRESENTATION - Can you present the business? Once per week? What tools are you using: Online video, UBP PowerPoint.
_____	_____	ONE ON ONES and TWO ON ONES – With your senior business partner and your team.
_____	_____	HOME BUSINESS PRESENTATIONS and/or UBP – Two per month (Bring two guests)
_____	_____	IN PERSON AND ONLINE RECRUITING – Duplicate with team. Recommended tools: UBP PowerPoint, videos, Product Catalog, Annual Report.
_____	_____	LEARN HOW TO BOOK APPOINTMENTS and CALL WORKSHOPS. Utilize www.youtube.com/marketamerica
_____	_____	LEARN HOW TO DO A GROUP PRESENTATION – Duplicate perfectly. Use commentator/buddy approach.
_____	_____	Add all points and record personal and team totals on cover sheet.
Total	Total	

Future Assignment: List answer values (0s, 1s, 2s, 3s) in ascending order on a separate piece of paper to prioritize areas for improvement.

Rate each one: 0 = Do not do yet, 1 = Seldom do, 2 = Occasionally do, 3 = Do often, but not consistently, 4 = Do all the time/have mastered. It is a habit and second nature.

5. FOLLOW-UP and ABC PATTERN OF BUILDING DEPTH

Personal Team

- _____ _____ **TOOLS** – Information Packet, Physical/Electronic, Flip Chart, audios, Getting Started Guide, About MA. Downloads, marketamerica.com, Annual Report, SHOP.COM, UnFranchise Media app downloaded.
- _____ _____ **CALENDAR / SCHEDULE** – No appointments = No Business!
- _____ _____ **MEETING AFTER THE MEETING** – What did you like most? Leading question and tie down. Book follow-up appointment!
- _____ _____ **BOOK A FOLLOW-UP FROM EACH MEETING IN YOUR CALENDAR (SCHEDULE AND BOOK)**
- _____ _____ **TRIAL RUN – TEST MARKET** – Evaluation technique.
- _____ _____ **SET UP TWO ON ONES OR A MEETING IN THEIR LOCATION OR HOME**
- _____ _____ **ABC PATTERN** – From each meeting in the next person’s location to bring people. Every three levels (ABC) – (a new person should show the plan). Duplicate house to house, product preview, Motives® overview, Home Business Presentation and Getting Started Guide.
- _____ _____ **TEACH EVERYONE TO BRING TWO PEOPLE TO THE UNFRANCHISE BUSINESS PRESENTATION FROM THE ABC PATTERN.**
- _____ _____ **SELL MONTHLY MEETING, TRAINING, SEMINAR TICKETS. HAVE TICKETS ON HAND. BUY THEM!**
You can’t sell a ticket you don’t have!
- _____ _____ **PROGRESS ONE ABC LEVEL PER WEEK.**
- _____ _____ **COMBINATIONS AND CROSS-POLLINATION** – How many teams in each town/city per organization? How many organizations am I working per night?
- _____ _____ **DUPLICATE PATTERN** – Promote new leaders within the organization
- _____ _____ **ARE YOU GUIDING THE ABC TRAFFIC?**
 - _____ Encourage each team member to bring prospects to UBP/HBP.
 - _____ Instruct them to come with you to meeting on bottom level.
 - _____ Teach them to book follow-ups.
 - _____ Show them how to sell tickets.
 - _____ Lead by example and do all of the above.
- _____ _____ **Add all points and record personal and team totals on cover sheet.**
- Total** **Total**