

**UnFranchise<sup>®</sup> Owner (UFO) Program**

**A Structured System of Success**

**for Market America Distributors**

## The UnFranchise® Owner (UFO) Program

The decision to open and build a Market America UnFranchise Business can be one of the most empowering and rewarding endeavors you'll ever undertake. As with a traditional franchise, the key to success will be your ability to effectively implement a tested and proven business plan. This business consists of standardized, coordinated, and systematic actions. These actions, completed in a timely manner, can result in fundamentally sound and consistent growth within your sales and distribution organizations.

The UnFranchise Owner Program is a structured system that identifies and quantifies what successful Market America Distributors are doing or have done to earn a significant income and increase their likelihood for success. This program allows you to enter into action with boldness and confidence.

Success is a journey, not a destination. The journey of a thousand miles begins with a single step and building your UnFranchise Business will proceed in the same manner. You have taken the first step by choosing the Two-to-Three year plan, however, the Two-to-Three-Year Plan does not start when you sign up, rather, it begins when you start implementing the Basic Five fundamentals of the business and are utilizing/implementing all of the components that make up the entire UnFranchise Business Development System. At a minimum, you should plan on a twelve month commitment to build the foundation for your UnFranchise Business. The twelve month action plan can be referenced in the Getting Started Guide & Action Plan for Success (Code 391, \$5.00 Pack of 10)

It is important to integrate the UFO Program in your business building efforts in order to become an **official** UnFranchise Owner. An UnFranchise Owner is a qualified and active Distributor who has made the commitment to master the UnFranchise Business Development System by implementing the established tasks, activities, and practices as set forth and defined in the UFO Program. By implementing the entire UnFranchise Business Development System and meeting the established criteria, these Distributors dramatically increase the chances for success. Leading by example and becoming a UFO creates a strong, stable and secure business with bigger and more frequent paychecks. In addition, these Distributors possess the means to measure, monitor, adjust and control their success and the success of those in their organization. The UFO Program consists of initial and requalification criteria providing you with everything you need to know, do, and have is already laid out.

Market America provides a proven business plan — not a get-rich-quick scheme, a game, a club, a hobby or a program. This is a business. If you work the system, the system will work for you. It is not a question of "if" the plan works, or "if" you can earn \$187,000 per year or more. The only question is when and how many times over. The real question is - Are you willing to make a commitment to yourself and the UnFranchise System by taking action? Your success with Market America is a direct reflection of your willingness to take responsibility for your business. It starts with you — you have to take action. The Two- to Three-Year Plan **only** works when all the components and principles that make up the UnFranchise Business Development System are thoroughly understood, embraced, implemented, mastered and made into a habit!

There are many components that make up the entire UnFranchise Business Development System which are designed to work together, as the whole is greater than the sum of the parts. By meeting the tasks and activities within this system, you ensure that all of these principles and components are being implemented, leaving nothing to chance, and dramatically increasing the chances for success. When you master the plan by becoming a UFO, statistical evidence shows you increase your chances for greater success and higher paychecks over those who do not participate in the UFO Program. Make success a habit — become a UFO and develop the habit of leadership!

Market America is a product brokerage and Internet marketing company that specializes in one-to-one marketing and mass customization. Determined to differentiate itself from other direct sales opportunities and to lead the parade into the one-to-one future with mass customization and computerized marketing through the use of electronic technology, Market America has built its success on a solid foundation of Four Cornerstones:

**1. Binomial Marketing System/Management Performance Compensation Plan (MPCP)**

**2. The UnFranchise Business Development System**

**3. The Product Brokerage System through Market America's Mall without Walls®**

**4. One-to-One Marketing and Mass Customization**

Market America's UnFranchise Business Development System incorporates the strengths of many different marketing systems such as direct sales, franchising, home shopping, discount buying, network marketing, Internet sales/e-commerce, one-to-one marketing and mass customization. The UnFranchise Business Development System is designed to support two processes. First, there is the principle of selling to one customer at a time as many products as possible over the lifetime of that customer's patronage. Secondly, an opportunity is provided for an individual to operate his/her own business by building and managing two or more sales and distribution organizations. Like a franchise, the UnFranchise business is a tried, tested, and proven system. Unlike a franchise, Sales Representatives and Distributors have the option of not implementing the entire UnFranchise Business Development System and still derive an income and maintain an association with Market America; however, these individuals are not considered official UnFranchise owners until they are implementing the entire system.

In order to assist those individuals aspiring to be official UnFranchise Owners, Market America conducted an analysis of common business activities and practices associated with individuals who were succeeding within Market America's UnFranchise Business Development System was conducted. The results of this analysis identified commonalities in six major areas:

**1. The Use of Business Support Materials**

**2. The Use of Communication and Management Services**

**3. Product Use and Retail Sales**

**4. Ongoing Training**

**5. Organizational Building**

**6. Pin Levels and commission consistency**

By further defining what successful Distributors are actually doing within the system, it qualified and quantified the basics and fundamentals of the UnFranchise Business Development System and the degree to which the entire system is being implemented as designed.

People have choices. You can be whatever you desire; a Sales Representative, a Distributor, or an UnFranchise Owner.

**Sales Representative** - An Individual who submits an Independent Distributor Application and Agreement without submitting the subscription fee, or who has elected not to renew his/her subscription. A Sales Representative may NOT participate in the MPCP for the purpose of earning Commissions and Management Bonuses. Sales Representatives may begin participating in the MPCP at a later time by submitting the subscription fee. A Sales Representative may purchase products at Distributor Cost for retail sale and/or personal use.

**Independent Distributor** - An Individual who submits an Independent Distributor Application and Agreement and the subscription fee in order to participate in the MPCP for the purpose of earning Commissions and Management Bonuses. An Independent Distributor may purchase products at Distributor cost for retail sale and/or personal use.

**UnFranchise Owner** - A qualified and active Distributor who has made the commitment to the UnFranchise® Business Development System by implementing the established tasks, activities, and practices as set forth and defined in the UFO Program.

The choice is yours. To be considered an official UnFranchise Owner, you must satisfy the established tasks, activities, and practices. The established tasks, activities, and practices delineated within the UnFranchise Owner Program will allow each individual to measure, monitor, adjust, and control his/her own progress, timing, and success as this system is implemented.

**UFO Recognition:**

1. Upon qualifying for your initial UFO status, you will receive a UFO Pin, and at the appropriate time your name will appear in the Leaderline.
2. Upon requalifying your UFO status three out of four consecutive calendar quarters, your name and photograph will appear in the Powerline Magazine.

**Earning UFO Pin Jacket with Stone(s):**

1. Upon earning a minimum of \$1500 per week from one BDC 39 out of 52 weeks each calendar year, you will be eligible to receive a Pin Jacket with one stone. Please check Annual requalification.
2. Your requalification as an official UFO will be satisfied by earning a minimum of \$1500 per week from one BDC 39 out of 52 weeks each calendar year. To receive your pin jacket with the number of stones that you have earned, simply send your current Pin Jacket with request for additional stone to Market America C/O UFO Program, 1302 Pleasant Ridge Road, Greensboro, NC 27409

**“Go confidently in the direction of your dreams!  
Live the life you’ve imagined.”**

-Thoreau

## **The UnFranchise® Owner (UFO) Program General Implementation Policies and Procedures:**

1. Each form must be filled out accurately and completely.
2. A completed Cover Sheet **must** accompany an Initial Qualification or Quarterly Requalification Verification and Validation Form in order to be processed.
3. **Do not** submit the Initial Qualification or Quarterly Requalification Verification and Validation Form unless all of the criteria/requirements have been met.
4. **Do not** forget to attach photocopies of requested documentation (i.e., business card, Basic Five Diagnostic Test, Monthly Preferred Customer Sales Reports, receipts and applicable surveys/questionnaires).
5. If you are using receipts to registered Preferred Customers in lieu of or in combination with monthly Preferred Customer Sales Reports, you must make a photocopy of those receipts and attach them to the monthly Preferred Customer Sales Reports and submit. (**Note:** Names of customers on receipts must be registered, active Preferred Customers. These names must be able to be cross referenced against names appearing on your monthly Preferred Customer Sales Reports.)
6. The receipts documenting the 900 BV retail sales requirement should be submitted as part of your usual Quarterly Sales Report (Form 1000) for the respective quarter, **not** attached to your UFO documentation.
7. All products and/or materials purchased to meet UFO requirements will be credited to the paying Distributor, with the following exception: first time orders (i.e. a Distributor's initial order) may be credited to the new Distributor for UFO requirements, even if the paying Distributor is the upline of the new Distributor.
8. You may use only one Distributorship to satisfy the sales requirements, 300 BV/Qtr., 900 BV/Qtr., and 30 IBV/Qtr. You may not use combinations of original Distributorships and 888 Distributorships.
9. Requirements that cannot be met due to unavailability will not prevent you from achieving UFO status; however, as soon as they become available they must be met and documented on the next Quarterly Requalification Verification and Validation Form submitted.
10. UnFranchise Owners must submit their Initial and/or Quarterly Requalification Forms within 28 days after the calendar quarter ending date in which requirements were met (i.e., within 28 days of the specific calendar quarter ending date).
11. Photographs for PowerLine are to be submitted to the Creative Services Department with name, ID number, and date. All photographs must be accompanied by a release form.
12. Do not attach UFO information with President Challenge Documentation and visa versa.
13. Keep Copies of initial and subsequent requalification forms and documentation.

## The UnFranchise® Owner (UFO) Program Verification and Validation Cover Sheet

As you satisfy each of the criteria for achieving or maintaining UnFranchise Owner status, please thoroughly and accurately document requested information on this form in order to expedite processing. This cover sheet must accompany all initial and requalification forms.

Name: \_\_\_\_\_ Distributor ID #: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

All requirements met for: Calendar Quarter Beginning Date: \_\_\_\_\_ Calendar Quarter Ending Date \_\_\_\_\_

**(Use calendar quarters: January – March, April – June, July – September or October – December)  
The UFO Criteria is no longer based on Distributor Quarter.**

**(check one):**  Initial  Requalification  Annual Requalification (see page 3)

Complete Mailing Address: \_\_\_\_\_

Home Phone # ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ Business # ( \_\_\_\_\_ ) \_\_\_\_\_

\*E-mail Address \_\_\_\_\_

Sponsor's Name: \_\_\_\_\_

Active Upline Certified Coordinator: \_\_\_\_\_

Upline Certified Trainer: \_\_\_\_\_

Upline Advisory Council Member: \_\_\_\_\_

Verification and Validation Information Being Requested:

1. Product Order Number Please note product order number posted on the online receipt.
2. Date(s) are week-ending Fridays of the specific week in which the respective order or form was submitted and processed.
3. Attached documentation is a legible photocopy of specific forms, receipts and/or reports attached to this form as requested.
4. Initial Qualification Verification and Validation Form is used to document satisfying the initial qualification criteria.
5. Quarterly Requalification Verification and Validation Form is used to document that you are satisfying ongoing requirements as an official UFO.
6. Calendar Quarter beginning and ending dates **must** coincide with your specific quarter for satisfying minimum activity requirements (i.e. 300 BV, 900 BV, and 30 IBV).
7. Name and Market America Identification Number is the name under which the Distributor is doing business and the associated Distributor Identification Number.
8. Upline Management's Name and Signature is the name and signature of the individual (CEC or higher) who is signing off that you are satisfying a requirement.
9. BDC Extension is the three digit extension number for the applicable information being requested.
10. Expiration Date is date in which a subscription or program enrollment expires.

\*Please keep your E-mail current with Market America.

# UnFranchise<sup>®</sup> Owner (UFO) Criteria

## Initial Calendar Quarter Qualification Verification and Validation Form Instructions

### **Business Support Materials Requirements**

1. Enter the Product Order Number used to purchase the UFO Business Support Materials Kit (Code 1526) and the date in which the order was processed.
2. Make a photocopy of your approved Market America Business Card and initial that you are attaching and submitting with this form.

### **Communication and Management Services**

1. Enter your Market America Voice Mail System extension number (ATG extension #)
2. Enter the order # for the UnFranchise Management System (UFMS) monthly fee

### **Product Use and Retail Sales Requirements**

1. Enter the Product Order Number(s) used to purchase a total of 300 BV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
2. Enter the Product Order Number(s) used to purchase a total of 900 BV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
3. Enter the Product Order Number(s) used to purchase a minimum total of 30 IBV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
4. Attach the Preferred Customer Order History to verify and validate maintaining a minimum of ten active registered preferred customers.
5. Submit documentation for submitting any surveys conducted for the respective quarter.

### **Organization Building Requirements**

1. Enter your Upline Management's name and have that person sign off that you presented the Market America Business Plan a minimum of once per week.
2. Enter the names and the Market America Identification Numbers of the two qualified Distributors that you personally sponsored for the respective quarter.

### **Training Requirements**

1. Enter Upline Management's name and have that person sign off that you attended or conducted three New Distributor Trainings.
2. Enter Upline Management's name and have that person sign off that you attended or conducted three Basic Five Trainings.
3. Enter Upline Management's name and have that person sign off that you attended or conducted **one** Executive Coordinator Certification Training (ECCT).
4. Enter Upline Management's name and have that person sign off that you purchased a minimum of (3) tickets to your areas Local Seminar, District Rally, Regional Convention, Leadership School, and International Convention.

### **Pin Level/Income Consistency Requirements**

1. Make a photocopy of your Basic Five Diagnostic Test cover sheet in which you scored greater than or equal to 50%. Initial that you are attaching and submitting the copy of the cover sheet with this form.

**AND/OR**

2. Enter the BDC extension from which you earned a minimum of \$900 in commissions for the respective quarter (BV and/or IBV)

# UnFranchise<sup>®</sup> Owner (UFO) Criteria

## Calendar Quarter Requalification Verification and Validation Form Instructions

### **Business Support Materials Requirements**

1. Enter the Product Order Number used to purchase a minimum of \$75 of business support materials for the respective quarter and the date in which the order was processed.
2. Make a photocopy of your approved Market America Business Card and initial that you are attaching and submitting with this form.

### **Communication and Management Services**

1. Enter your Market America Voice Mail System extension number (ATG extension #)
2. Enter the order # for the UnFranchise Management System (UFMS) monthly fee

### **Product Use and Retail Sales Requirements**

1. Enter the Product Order Number(s) used to purchase a total of 300 BV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
2. Enter the Product Order Number(s) used to purchase a total of 900 BV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
3. Enter the Product Order Number(s) used to purchase a minimum total of 30 IBV of product for the respective quarter and the date(s) in which the order(s) were processed. If using Transfer Buying orders to satisfy this requirement, enter the BDC extension and the respective pull week.
4. Attach the Preferred Customer Order History to verify and validate maintaining a minimum of ten active registered preferred customers.
5. Submit documentation for submitting any surveys conducted for the respective quarter.

### **Organization Building Requirements**

1. Enter your Upline Management's name and have that person sign off that you presented the Market America Business Plan a minimum of once per week.
2. Enter the names and the Market America Identification Numbers of the two qualified Distributors that you personally sponsored for the respective quarter.

### **Training Requirements**

1. Enter Upline Management's name and have that person sign off that you attended or conducted three New Distributor Trainings.
2. Enter Upline Management's name and have that person sign off that you attended or conducted three Basic Five Trainings.
3. Enter Upline Management's name and have that person sign off that you attended or conducted **one** Executive Coordinator Certification Training (ECCT).
4. Enter Upline Management's name and have that person sign off that you purchased a minimum of (3) tickets to your areas Local Seminar, District Rally, Regional Convention, Leadership School and International Convention.

### **Pin Level/Income Consistency Requirements**

1. Make a photocopy of your Basic Five Diagnostic Test cover sheet in which you scored greater than or equal to 50%. Initial that you are attaching and submitting the copy of the cover sheet with this form.

AND/OR

2. Enter the BDC extension from which you earned a minimum of \$900 in commissions for the respective quarter. (BV and/or IBV)

# UnFranchise<sup>®</sup> Owner (U F O) Criteria

## Initial Calendar Quarter Qualification Verification and Validation Form

**Note: All initial qualification criteria must be satisfied within the calendar quarter in which you are applying**

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Name \_\_\_\_\_ Distributor ID# \_\_\_\_\_

Calendar Quarter Beginning Date \_\_\_\_\_ Calendar Quarter Ending Date \_\_\_\_\_  
 (Use calendar quarters: January – March, April – June, July – September or October – December)  
 The UFO Criteria is no longer based on Distributor Quarter.

**Business Support Materials Requirements**

- Purchased UFO Business Support Materials Kit Order# \_\_\_\_\_ Date \_\_\_\_\_
- Approved Business Cards Documentation Attached \_\_\_\_\_ (initials)

**Communication and Management Services**

- Current PatLive Subscription ATG Extension # \_\_\_\_\_
- Current UFMS Subscription Order # \_\_\_\_\_

**Product Use and Retail Sales Requirements**

- Purchased a minimum of 300 BV per quarter as the paying ID (can be satisfied by Transfer Buying) Order # \_\_\_\_\_ Date \_\_\_\_\_  
 \_\_\_\_\_ Date \_\_\_\_\_  
 \_\_\_\_\_ Date \_\_\_\_\_
- Retail a minimum of 900 BV per quarter (verification and validation will be as follows: order a minimum of 900 BV per quarter as the paying ID OR have a minimum of 900 BV in product sales documented in your PC order history OR a combination of the two.) Order # \_\_\_\_\_ Date \_\_\_\_\_  
 \_\_\_\_\_ Date \_\_\_\_\_  
 \_\_\_\_\_ Date \_\_\_\_\_

*(The criteria above is in alignment with the Base Ten, Seven Strong principle: Each Distributor 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 Distributors on the left and three Distributors on the right each implementing Base Ten = **Base Ten, Seven Strong** = earning \$300 per month)*

- Purchased a minimum of 30 IBV per quarter as the paying ID
- Maintain 10 Active Registered Preferred Customers
- Respond to Surveys

Order # \_\_\_\_\_ Date \_\_\_\_\_  
 Order # \_\_\_\_\_ Date \_\_\_\_\_

Documentation Attached \_\_\_\_\_ (initials)

Print and submit \_\_\_\_\_ (initials)

**Organization Building Requirements**

- Presented the UnFranchise® Business Plan once per week to qualified prospect.
- Sponsored a minimum of two qualified Distributors

Upline Mgt. Name \_\_\_\_\_  
 Upline Mgt. Signature \_\_\_\_\_

Name \_\_\_\_\_ Distributor ID# \_\_\_\_\_

Name \_\_\_\_\_ Distributor ID# \_\_\_\_\_

**Training Requirements**

- Attended or conducted three New Distributor Trainings (Public and/or In-House)
- Attended or conducted three Basic Five Trainings (Public and/or In-House)
- Attended a minimum of one (1) Executive Coordinator Certification Trainings per year.
- Ticket Requirements:  
 Local Seminar (3)                      District Rally (3)  
 Regional Convention (3)              Leadership School (3)  
 International Convention (3)

Upline Mgt. (Name) \_\_\_\_\_

Upline Mgt. (Signature) \_\_\_\_\_

Location \_\_\_\_\_  
 Date \_\_\_\_\_

**Pin Level/Income Consistency Requirements**

- Score greater than or equal to 50% on the Basic 5 Diagnostic Test  
*AND/OR*
- Earn a minimum of \$900 in commissions from one BDC per quarter

Documentation Attached \_\_\_\_\_ (initials)

BDC Extension \_\_\_\_\_



- Purchased a minimum of 30 IBV per quarter as the paying ID
- Maintain 10 Active Registered Preferred Customers
- Respond to Surveys

Order # \_\_\_\_\_ Date \_\_\_\_\_  
 Order # \_\_\_\_\_ Date \_\_\_\_\_

Documentation Attached \_\_\_\_\_ (initials)

Print and submit \_\_\_\_\_ (initials)

**Organization Building Requirements**

- Presented the UnFranchise® Business Plan once per week to qualified prospect.
- Sponsored a minimum of two qualified Distributors

Upline Mgt. Name \_\_\_\_\_  
 Upline Mgt. Signature \_\_\_\_\_

Name \_\_\_\_\_

Distributor ID# \_\_\_\_\_

Name \_\_\_\_\_

Distributor ID# \_\_\_\_\_

**Training Requirements**

- Attended or conducted three New Distributor Trainings
- Attended or conducted three Basic Five Trainings
- Attended a minimum of one (1) Executive Coordinator Certification Trainings per year
- Ticket Requirements:  
 Local Seminar (3)                      District Rally (3)  
 Regional Convention (3)              Leadership School (3)  
 International Convention (3)

Upline Mgt. (Name) \_\_\_\_\_  
 Upline Mgt. (Signature) \_\_\_\_\_

**Pin Level/Income Consistency Requirements**

- Score greater than or equal to 50% on the Basic 5 Diagnostic Test  
**AND/OR**
- Earn a minimum of \$900 in commissions from one BDC per quarter

Documentation Attached \_\_\_\_\_ (initials)

BDC Extension \_\_\_\_\_

## THE BASIC FIVE - DIAGNOSTIC EFFICIENCY TEST

The Basic Five Starts With You!

### LEAD BY EXAMPLE

The Basic Five Diagnostic Efficiency Test is a comprehensive assessment of how well you and your sales and distribution organizations are implementing fundamental business activities and practices. Completion of this test 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, requiring minimal conscious effort. Learning, implementing, and ultimately mastering the Basic 5 has remained the key success factor to the growth of each and every UnFranchise® business despite the company's dramatic evolution.

It is imperative that you conduct this personal and group 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 Five Scores: Transfer personal and group totals from each section and multiply to obtain respective scores.

**Developing Attitude and Knowledge:** \_\_\_\_\_ Total x 1.087= \_\_\_\_\_ Personal Points

\_\_\_\_\_ Total x 1.087= \_\_\_\_\_ Group Points

**Goals & a Goal Statement:** \_\_\_\_\_ Total x 1.67= \_\_\_\_\_ Personal Points

\_\_\_\_\_ Total x 1.67= \_\_\_\_\_ Group Points

**Retailing:** \_\_\_\_\_ Total x 2.083= \_\_\_\_\_ Personal Points

\_\_\_\_\_ Total x 2.083= \_\_\_\_\_ Group Points

**Prospecting / Recruiting / Sponsoring:** \_\_\_\_\_ Total x 1.92= \_\_\_\_\_ Personal Points

\_\_\_\_\_ Total x 1.92= \_\_\_\_\_ Group Points

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

\_\_\_\_\_ Total x 1.92= \_\_\_\_\_ Group Points

**Total Personal Points = \_\_\_\_\_ ÷ 500 = \_\_\_\_\_ % Personal Score**

**Total Group Points = \_\_\_\_\_ ÷ 500 = \_\_\_\_\_ % Group Score**

Name: \_\_\_\_\_ MA/ID# \_\_\_\_\_

Rate each one: 0 = Do not do yet 1 = Seldomly 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	Group	
_____	_____	<b>DO YOU TREAT THIS LIKE A BUSINESS?</b> - Not a hobby, program, deal, club, etc.
_____	_____	<b>CAREER MANUAL - READ IT, LEARN IT</b> – Read 15 minutes per day.
_____	_____	<b>POWERLINE</b> – Read cover to cover.
_____	_____	<b>UNFRANCHISE.COM</b> – Are you familiar with the many services & functionality? Rep. ID#, password
_____	_____	<b>SPECIALIZE IN A STORE</b> – Know the benefits, special features, price justification and merchandising techniques.
_____	_____	<b>TAPE/CD LIBRARY</b> – Have tapes to lend out – Dr.’s tool kit – Know how to use tapes to teach people. Leverage time, instill belief, and create duplication. Includes IBV.
_____	_____	<b>A MINIMUM OF FOUR TAPES/CDs PER MONTH (LISTEN, LEARN, TEACH, SHARE)</b>
_____	_____	<b>BASIC FIVE TRAINING (B5)</b> – Attend or conduct once per month. Basic Five Audio Set
_____	_____	<b>WEEKLY COUNCILING WITH UPLINE FIRST 90 DAYS</b>
_____	_____	<b>LOCAL SEMINAR / DISTRICT RALLY</b> – Pre-purchase tickets. Sell Tickets.
_____	_____	<b>TWO SECOND LOOKS PER MONTH</b> – Attend and <i>bring</i> two new people.
_____	_____	<b>WEEKLY CALL TO UPLINE: POSITIVE SOLUTIONS</b> – Motivate the Upline, not just to discuss problems. Review progress.
_____	_____	<b>READ 15 MINUTES PER DAY</b> – New material each week. You are a teacher. You are a motivator. You are a mentor. You are a leader.
_____	_____	<b>VOICEMAIL (PatLive)</b> – Managing is 90% communication. Are you enrolled? Do you utilize? Earn IBV as UFMS member.
_____	_____	<b>ASSOCIATE WITH POSITIVE, SUCCESSFUL PEOPLE</b>
_____	_____	<b>DON’T GET STUCK ON THE DOT</b>
_____	_____	<b>ECCT TRAINING</b> – Attend or conduct at least twice per year.
_____	_____	<b>GETTING STARTED GUIDE AND ACTION PLAN FOR SUCCESS</b> – Review with Upline. Accountability. Minimum tasks and activities.
_____	_____	<b>ATTEND REGIONAL CONVENTION</b> – Buy your tickets and tickets for number of “Go Now” Distributors you plan to sponsor.
_____	_____	<b>MAKE SURE ALL LEADERS IN YOUR ORGANIZATION PURCHASE TICKETS FOR THE MONTHLY EVENT</b> (Local, District, Regional, Leadership School, International Convention)
_____	_____	<b>NEW DISTRIBUTOR TRAININGS (NDT)</b> – Attend or conduct once per month.
_____	_____	<b>TEACH AND SELL ANSWERS TO POLICIES, REQUIREMENTS, AND MANAGEMENT RESPONSIBILITY TO YOUR GROUP</b> Become a teacher and a coach.
_____	_____	<b>UNFRANCHISE MANAGEMENT SYSTEM (UFMS)</b> – Have you added the UFMS to your transfer buying? 30% IBV for PatLive monthly bill. Necessary to exercise the monthly accrual option. Provides the tools necessary to manage your business.
_____	_____	<b>Add all points and record personal and group totals on cover sheet.</b>
<b>Total</b>	<b>Total</b>	

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

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**2. GOALS & GOAL STATEMENT**

**Personal Group**

- \_\_\_\_\_ **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 Pin 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. Pin 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 Pin Level, the organization, the things or lifestyle, the PowerLine, BE IT.
  - \_\_\_\_\_ **PICTURES, BROCHURES, FINANCING, GO SEE IT, TEST IT, 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 Upline mentor regularly to review.
  - \_\_\_\_\_ **STRATEGIC BUILDING PLAN** – Where to work to reach group objectives in each leg. Maximize with combinations and cross-pollination.
  - \_\_\_\_\_ **TICKET GOAL** – Local \_\_\_\_\_ District \_\_\_\_\_ Regional \_\_\_\_\_ Leadership School \_\_\_\_\_ International Convention \_\_\_\_\_
- Total Total Add all points and record personal and group totals on cover sheet.**

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

**3. RETAILING**

**Personal Group**

\_\_\_\_\_ **TRANSFER BUYING PROGRAM** – Are you enrolled? Have you added UFMS? BV and IBV.

\_\_\_\_\_ **SPECIALIZE IN A STORE** – Know the benefits, special features, price comparisons and justifications.

\_\_\_\_\_ **BASE TEN** – Minimum production: Each Distributor 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 Distributors on the left and three Distributors on the right each implementing Base Ten = **Base Ten, Seven Strong** = earning \$300 per month.

\_\_\_\_\_ **MERCHANDISING TECHNIQUES** – Check the techniques you are using

- |   |   |
|---|---|
| _____ Trial size marketing                | _____ Demonstrations                              |
| _____ Audio/Video/CD/DVD Marketing        | _____ Targeted mailings                           |
| _____ Counter displays                    | _____ Commercial sales                            |
| _____ OPC-3™ evaluation and retail system | _____ Preferred Customer Program                  |
| _____ Cosmetic consultations or clinics   | _____ One-to-One Marketing and Mass Customization |
| _____ Nutri-Physical™                     | _____ Web Portal                                  |
| _____ GoNowMail™                          | _____ Preferred Customer Business Card CD         |
| _____ Mini Product Web Sites              |   |

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

\_\_\_\_\_ **REGISTERED PREFERRED CUSTOMERS** – Are *all* customers registered?

\_\_\_\_\_ **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** - Have you utilized? Build share of customers?

\_\_\_\_\_ **WEB PORTAL** – A necessity, create BV & IBV, provides web presence, E-Commerce

\_\_\_\_\_ **DRIVE TRAFFIC / PROMOTE YOUR WEB PORTAL** – Word of mouth, business cards, GoNowmail™, Preferred Customer Business Card CD, Mini Product Web Sites, Distributor locator listings, brochures / eflyers, Nutri-Physical™

\_\_\_\_\_ **INCENTIVE BUSINESS VOLUME (IBV)** – Endless Shopping Experience™, designate center, determine placements.

\_\_\_\_\_ **AUTO BV** – Determine placement.

**Total Total Add all points and record personal and group totals on cover sheet.**

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

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**4. PROSPECTING / RECRUITING / SPONSORING**

**Personal Group**

- |              |              |  |
|--------------|--------------|--|
| _____        | _____        | <b>WHO DO YOU KNOW LIST</b> – 100 to 500 people.   |
| _____        | _____        | <b>POSSIBILITY LIST</b> – Your inventory. No possibilities, No business!   |
| _____        | _____        | <b>ADD TWO POSSIBILITIES PER DAY</b> – Habit   |
| _____        | _____        | <b>TOP 10 LIST</b> – Those possibilities who show interest, curiosity. Decide type of approach (i.e. referral, evaluation, direct, product, audio/video/DVD)   |
| _____        | _____        | <b>ANSWER TO “WHAT IS IT?”</b> – On a 3 x 5 note card. The best answer is <i>your</i> answer. Learn to talk in themes.   |
| _____        | _____        | <b>TWO MINUTE COMMERCIAL</b> – Your reason Why? Written out and rehearsed.   |
| _____        | _____        | <b>ONE ON ONES</b> – Can you present the business? Once per week?  |
| _____        | _____        | <b>TWO ON ONES</b> – With your sponsor or your organization.   |
| _____        | _____        | <b>SECOND LOOKS</b> – Two per month (Bring two people)   |
| _____        | _____        | <b>DEVELOP SOURCES</b> – Referrals, Ads, MLM/network marketing contacts, Three-Foot Rule: People talk about three things.  |
| _____        | _____        | <b>AUDIO AND VIDEO RECRUITING</b> – A minimum of three-five audios and/or videos/DVDs circulating weekly. Duplicate with each “Go Now” Distributor. Recommended tools: Make Your Move audio CD, Wake Up audio CD, Three Part DVD UnFranchise Advantage CD, Success from Home magazine and DVD  |
| _____        | _____        | <b>LEARN HOW TO DO ONE ON ONE PRESENTATION WITH FLIPCHART</b> – Practice once a day, show the plan daily to someone. Recommended Tools: Three Part DVD (“The System”), Powerpoint presentation (UnFranchisetraining.com), small Flip Chart, BIG Flip Chart, online presentation, UnFranchise Advantage CD, and Script in Career Manual |
| _____        | _____        | <b>LEARN HOW TO DO A GROUP PRESENTATION</b> – Duplicate perfectly. Use commentator approach. Remember: the person who holds the marker makes the money.  |
| <b>Total</b> | <b>Total</b> | <b>Add all points and record personal and group totals on cover sheet.</b>   |

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

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**5. FOLLOW-UP and ABC PATTERN OF BUILDING DEPTH**

**Personal    Group**

- |              |              |   |
|--------------|--------------|---|
| _____        | _____        | <b>TOOLS</b> – Information Packet, small Flip Chart, audios/videos/CDs, Getting Started Guide and Action Plan for Success.  |
| _____        | _____        | <b>CALENDAR / SCHEDULE</b> – No appointments = No Business!   |
| _____        | _____        | <b>MEETING AFTER THE MEETING</b> – What did you like most? Leading question and tie down. Book follow-up appointment!   |
| _____        | _____        | <b>TRIAL RUN – TEST MARKET</b> – Evaluation technique.  |
| _____        | _____        | <b>BOOK A FOLLOW-UP FROM EACH MEETING IN YOUR CALENDAR (SCHEDULE AND BOOK)</b>  |
| _____        | _____        | <b>SET UP TWO ON ONES OR A MEETING IN <u>THEIR</u> LOCATION OR HOME</b>   |
| _____        | _____        | <b>ABC PATTERN</b> – 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® preview, ABC/trial run meeting, home kickoff and Getting Started Guide and Action Plan for Success. |
| _____        | _____        | <b>TEACH EVERYONE TO BRING TWO PEOPLE TO THE SECOND LOOK FROM THE ABC PATTERN.</b>  |
| _____        | _____        | <b>SELL MONTHLY MEETING, TRAINING, SEMINAR TICKETS. HAVE TICKETS ON HAND. BUY THEM!</b><br>You can’t sell a ticket you don’t have!  |
| _____        | _____        | <b>PROGRESS ONE ABC LEVEL PER WEEK.</b>   |
| _____        | _____        | <b>COMBINATIONS AND CROSS-POLLINATION</b> – How many groups in each town/city per leg? How many legs am I working per night?  |
| _____        | _____        | <b>DUPLICATE PATTERN</b> – Pass the marker. One person every three levels must pick up the pattern.   |
| _____        | _____        | <b>ARE YOU DIRECTING THE ABC TRAFFIC?</b>   |
|              | _____        | Assigning each team member to bring prospect to Second Look   |
|              | _____        | Directing them to come with you to meeting on bottom level.   |
|              | _____        | Directing them to book follow-ups.  |
|              | _____        | Directing them to sell tickets.   |
| <b>_____</b> | <b>_____</b> | <b>Add all points and record personal and group totals on cover sheet.</b>  |

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

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