

THE BASIC 5: DIAGNOSTIC EFFICIENCY ASSESSMENT

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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 for 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. **Transfer your personal and team totals from each section to the end of this assessment.**

RATING SYSTEM: 0 = DO NOT DO YET 1 = SELDOM 2 = OCCASIONALLY 3 = OFTEN BUT NOT CONSISTENTLY 4 = CONSISTENTLY/MASTERED

1. DEVELOPING ATTITUDE AND KNOWLEDGE	PERSONAL	TEAM
Getting Started Guide – review personally and with new partners upon their registration		
UnFranchise Virtual Partner (UFVP) – use and introduce new partners to UFVP		
Do you treat this like a business? – not like a hobby		
Career Manual – read it and be familiar with it (http://usacan-eng.documents.unfranchise.com/)		
Read UnFranchise Owner Magazine and UnFranchise News emails		
Teach and explain to your team the UnFranchise Business policies, requirements and management responsibilities – become a teacher and a coach		
UnFranchise.com – be familiar with its functionality		
Specialize in a product(s) – know the benefits, special features, price justification and merchandising techniques		
SHOP.COM and other sites – (i.e. isotonix.com, motivescosmetics.com, tIsSim.com, GLOBAL.SHOP.COM, getconquer.com and custom mini websites) be familiar with its functionality, features and benefits.		
UnFranchise Media App – download/install and listen to at least four audios each week		
Basic 5 Training (B5) and New UnFranchise Owner Training (NUOT) – attend or conduct once per quarter		
Executive Coordinator Certification Training (ECCT) – attend or conduct at least once per year		
UnFranchise Business Presentation (UBP) – attend at least one UBP per month AND bring guests		
Attend Local Seminar – purchase a minimum of three tickets to each Local Seminar.		

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1. DEVELOPING ATTITUDE AND KNOWLEDGE (continued)	PERSONAL	TEAM
Attend District Conference, Regional Convention, World Conference and International Convention – purchase a minimum of three tickets to each major event		
Are you and your team purchasing a minimum of three tickets for each of these events? Local, District, Regional, World Conference, International Convention		
Complete the Local, District, Regional and President's Challenges		
Read 15 minutes per day – business, sales or leadership material		
Associate with positive, successful people		
Are you and your team correctly enrolled in UnFranchise® AutoShip? UnFranchise Management System (UFMS), BV 50/100/150 and IBV 10/20/30		
Are you and your team opted in for Auto Renewal?		
Weekly counseling with senior business partner during the first 90 days		
Complete the online Shopping Annuity Assessment, and revise/review it quarterly		
Purchase and personally use or sell a total of 1,500 BV of products each quarter Master UFO and Shopping Annuity® Bonus Program (SABP) criteria		
Generate \$1,500 worth of Partner Store purchases between you and your customers each quarter – Master UFO Criteria, SABP criteria is \$3,000		
Are you implementing the Shopping Annuity activities and completing the SABP criteria?		
ADD ALL PERSONAL AND TEAM POINTS AND ENTER TOTALS	TOTAL	TOTAL
2. GOALS AND A GOAL STATEMENT	PERSONAL	TEAM
Goals and action plan for success – review with senior business partner and with team		
Define your WHY – what is the driving reason why you are building the business? If you cannot write it down, then you do not have it or you do not know it		
Define your short-term, intermediate and long-term goals (short term is three months, intermediate is 12 months, long term is 60 months) – 5 to 10 goals in ascending order of attainability		
Determine the income needed to achieve your short-term, intermediate and long-term goals		

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2. GOALS AND A GOAL STATEMENT (continued)	PERSONAL	TEAM
Determine when you want to achieve your short term, intermediate and long term goals? – exact dates		
Translate your goals into the business – how many Business Development Centers qualifying per month to earn the necessary income? UnFranchise® Level?		
Detailed plan – daily, weekly, monthly, yearly activities		
Determine what you will give up or overcome to achieve.		
Have a written Goal Statement and read it twice each day – refer to the Getting Started Guide or UnFranchise Virtual Partner		
To do list – prioritize each day		
Consistently schedule and attend meetings, corings, counsellings and events (Locals, HBPs, UBPs, trainings, etc)		
Measure where you are daily, weekly and monthly – meet with sponsor, senior business partner or mentor/coach regularly to review		
Participate in an accountability group – know where to focus your business building efforts		
Ticket goal: Local _____ District _____ Regional _____ World Conference _____ International Convention _____		
ADD ALL PERSONAL AND TEAM POINTS AND ENTER TOTALS	TOTAL	TOTAL
3. RETAILING	PERSONAL	TEAM
Use the companies exclusive products – how many do you use? How many more could you use? Home Shopping List, online Shopping Annuity Assessment, General Product Training (attend and promote)		
SHOP.COM – shop through the Partner Stores and be familiar with the functionality (ISM training, attend and promote)		
ShopBuddy® – download/install ShopBuddy on all computers/devices that you use		
Drive traffic/promote your site(s) – word of mouth, ShopBuddy, business cards, SHOP.COM overview, eGifts, trend shop, social media, invite-your-friends tool, brochures, Nutri-Physical®, add new Preferred Customers		
Shopping Annuity® – understand the concept and convert your spending into earning		

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3. RETAILING (continued)	PERSONAL	TEAM
Shopping Annuity® Bonus Program (SABP) – understand the criteria, participate in the program, and promote it within your organization		
UnFranchise® AutoShip Program – enrolled correctly in UnFranchise AutoShip program utilize AutoShip Excess Volume Placement toward your Shopping Annuity		
Base 10, Seven Strong – implement and earn \$300 or more per month (Basic 5 Training, attend and promote)		
iTransact – enrolled		
Preferred Customer AutoShip – understand the benefits of AutoShip and promote		
Merchandising techniques – Use various techniques: SHOP.COM overview, social media, trial-size marketing (Daily Essentials packets, etc.), General Product Training with guest, eGifts, Cashback/free shipping, AutoShip discounts, Motives® online parties, TLS® 21-Day Challenge groups, Home Shopping List, online Shopping Annuity Assessment, Nutri-Physical®, Skincare Analysis, share product video, product specific sites		
Home Product Presentations – schedule for each new team member, conduct/attend regularly, Wellness 101; product preview; TLS overview; Motives overviews, consultations or clinics		
Ongoing customer contact/follow-up – develop relationship; add-on sales, repeat sales, referrals		
ADD ALL PERSONAL AND TEAM POINTS AND ENTER TOTALS	TOTAL	TOTAL
4. PROSPECTING/RECRUITING/SPONSORING	PERSONAL	TEAM
Possibilities List – 100 to 300 people with phone numbers and email addresses		
Add two new possibilities per day – should become a habit		
Answer to “What is it?”		
Two-minute commercial – your story, this is why you started your business		
Conduct call workshops and schedule appointments – schedule call workshops regularly with your team. Utilize training videos, youtube.com/marketamerica and MeetON.com		
Learn to present the business (show the Plan) – Download the UnFranchise Business Presentation (UBP) PowerPoint from UnFranchiseTraining.com, watch the UnFranchise Business Presentation video at youtube.com/marketamerica.com or MeetON.com		

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4. PROSPECTING/RECRUITING/SPONSORING (continued)	PERSONAL	TEAM
Conduct one-on-one's and two-on-one's regularly – two-on-one's with your sponsor or senior business partners or your team, present the Plan twice per week		
Home Business Presentations (HBP) – schedule and conduct regularly with your team (bring guests)		
UnFranchise® Business Presentations – Attend UBPs with guests		
ADD ALL PERSONAL AND TEAM POINTS AND ENTER TOTALS	TOTAL	TOTAL
5. FOLLOW-UP AND ABC PATTERN OF BUILDING DEPTH	PERSONAL	TEAM
Familiarize yourself with and utilize the tools available – have tickets to sell, Product Catalog, About MA PDF, Global Annual Report, Getting Started Guide, SHOP.COM, marketamerica.com, webinar, MeetON		
Schedule – create the habit of scheduling a follow up appointment for each meeting		
Meeting after the meeting – introduce your guests to other UnFranchise Owners, schedule follow-up appointment(s), sell a ticket(s) to the next GMTSS event		
Trial run – sell products, sell a ticket, schedule a home event		
Schedule an appointment to register their business – sell a ticket, review Getting Started Guide, download UF Media App, download UFVP App		
Schedule two-on-one's and home meetings (HBPs, product previews, Wellness 101s, Motives® overviews) – utilize call workshops		
ABC pattern for duplication – duplicate house to house: HBP, product preview, Wellness 101, Motives overview		
Teach everyone on the team to bring guest(s) - to each meeting as the business develops		
Sell monthly Global Meeting, Training and Seminar System (GMTSS) tickets. – you can't sell a ticket you don't have!		
Maximize your time – how many different teams am I working with at each meeting? Use combinations and cross pollination		
Develop Leadership and create duplication – encourage new UnFranchise Owners to present the business Plan.		
ADD ALL PERSONAL AND TEAM POINTS AND ENTER TOTALS	TOTAL	TOTAL



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BASIC 5 ASSESSMENT

TRANSFER PERSONAL AND TEAM TOTALS FROM EACH SECTION AND MULTIPLY TO OBTAIN RESPECTIVE SCORES

FULL NAME: _____ UNFRANCHISE® ID#: _____

1. DEVELOPING ATTITUDE AND KNOWLEDGE	PERSONAL POINTS	TEAM POINTS
_____ Total x 0.96 (Personal) _____ Total x 0.96 (Team)		
2. GOALS AND A GOAL STATEMENT	PERSONAL POINTS	TEAM POINTS
_____ Total x 1.78 (Personal) _____ Total x 1.78 (Team)		
3. RETAILING	PERSONAL POINTS	TEAM POINTS
_____ Total x 1.92 (Personal) _____ Total x 1.92 (Team)		
4. PROSPECTING/RECRUITING/SPONSORING	PERSONAL POINTS	TEAM POINTS
_____ Total x 2.77 (Personal) _____ Total x 2.77 (Team)		
5. FOLLOW-UP AND ABC PATTERN OF BUILDING DEPTH	PERSONAL POINTS	TEAM POINTS
_____ Total x 2.27 (Personal) _____ Total x 2.27 (Team)		

TOTAL PERSONAL POINTS = _____ ÷ 5 = _____ % PERSONAL SCORE

TOTAL TEAM POINTS = _____ ÷ 5 = _____ % TEAM SCORE

