

MONTHLY ACTION PLANNER (M.A.P.)

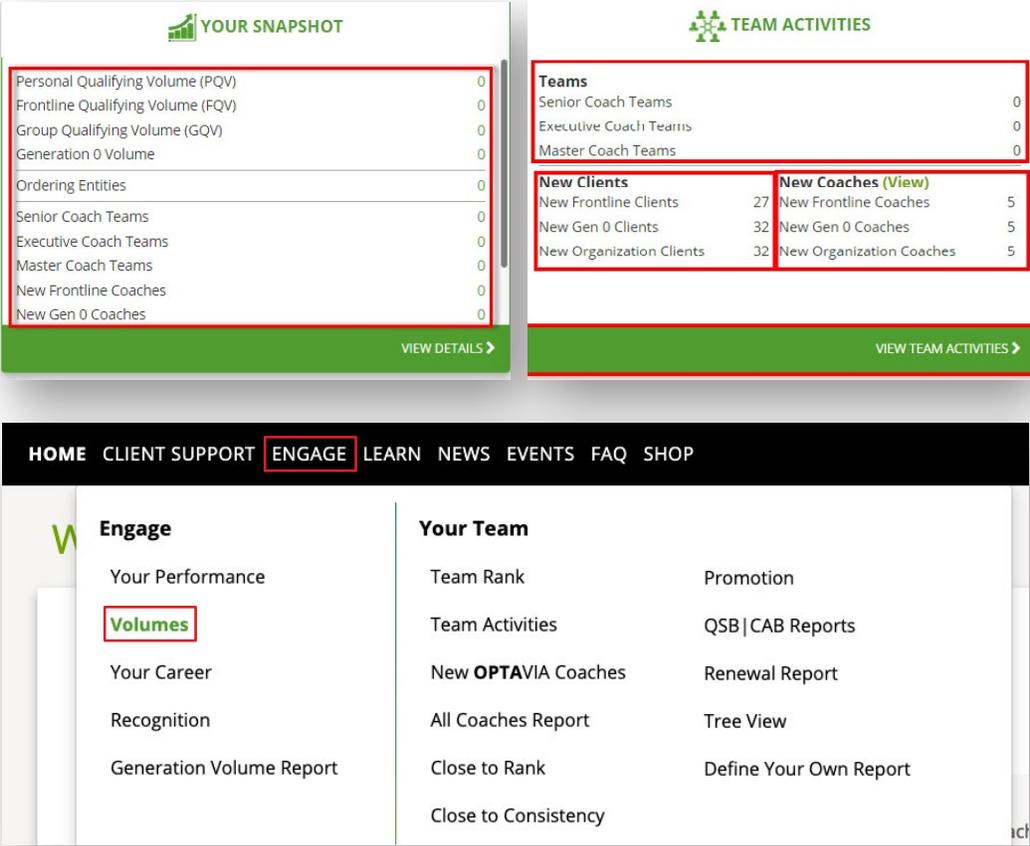
Write your name and the month for which you are completing the MAP. Use the integration boxes at the top to track your progress throughout the month as you achieve qualifications.

A.

Last Month/Current Reality: Share your month end rank, Frontline Qualifying Volume (FQV), Group Qualifying Volume (GQV), income, new Clients personally sponsored, new Frontline Coaches (personally sponsored), new Senior Coaches (personally sponsored) and your current health status.

- Go to [OPTAVIA CONNECT](#) to look at Your Snapshot and Team Activities.
- Or you can find this information clicking on the ENGAGE tab, then VOLUMES, and scrolling to the bottom of the page.

This information can be found in YOUR SNAPSHOT and TEAM ACTIVITIES on the final day of the previous month on the home page of [OPTAVIA CONNECT](#).

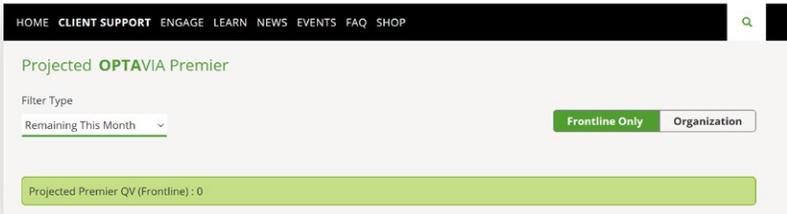
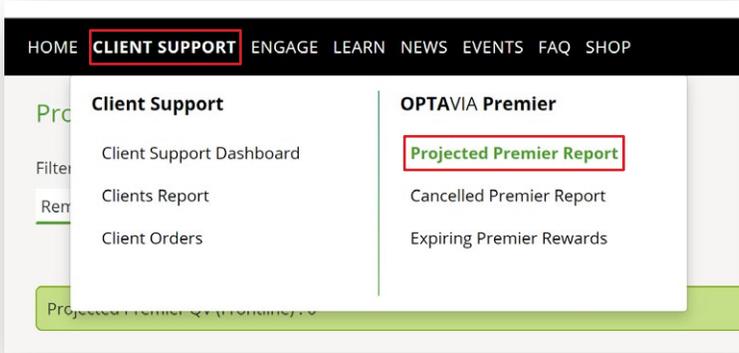


Personal Qualifying Volume (PQV)	0
Frontline Qualifying Volume (FQV)	0
Group Qualifying Volume (GQV)	0
Generation 0 Volume	0
Ordering Entities	0
Senior Coach Teams	0
Executive Coach Teams	0
Master Coach Teams	0
New Frontline Coaches	0
New Gen 0 Coaches	0

Teams	
Senior Coach Teams	0
Executive Coach Teams	0
Master Coach Teams	0
New Clients	
New Frontline Clients	27
New Gen 0 Clients	32
New Organization Clients	32
New Coaches (View)	
New Frontline Coaches	5
New Gen 0 Coaches	5
New Organization Coaches	5

B.

Current Month/Desired Outcome: Clarify your desired outcome for the current month by filling in your desired rank, Frontline Qualifying Volume (FQV), Group Qualifying Volume (GQV), income, new Clients, new Coaches, new Senior Coaches and health goal(s). Contact your Business Mentor if you're unclear of what's possible and what you need to accomplish to achieve your goals in the time frames you've established.

<p>C.</p>	<p>In the Potential Clients section, identify your strongest Candidates you'd like to enroll this month or those that you could reach out to and share what OPTAVIA has to offer.</p>
<p>D.</p>	<p>Identify Potential Coaches: In this section, write down the names of the Clients who you would like to offer the coaching opportunity and the non-client Coach Candidates you plan to reach out to this month. These Candidates should be coachable, optimistic, ambitious, caring and/or hungry for better health and wellbeing.</p>
<p>E.</p>	<p>Client Orders of 350 PQV+: Run a Projected OPTAVIA Premier Report, select Filter Type "After This Month" (if completing the MAP before the first of the month) and then click on the column heading "Next Premier Order Date".</p>  <p>This will sort orders in chronological order so you can fill out the ACTIVE Clients section of the MAP starting at the bottom.</p> <p>Add each active Client along with their Premier Order Processing Date, and the Projected Premier QV order amount. Do not list Client maintenance orders or Coach orders in this section. These orders go in Section H.</p> <p>To run this report:</p> <ol style="list-style-type: none"> Open OPTAVIA CONNECT. Under the Client Support tab, select Projected Premier Report for a list of all Clients that have a Premier order. 

<p>F.</p>	<p>New Clients Enrolled This Month: Write down the names of new Clients you personally enroll during the current month to help you achieve your goal listed in the Desired Outcome section.</p>
<p>G.</p>	<p>New Coaches Enrolled This Month: Write down the names of new Coaches you personally enroll during the current month to help you achieve your goal listed in the Desired Outcome section.</p>
<p>H.</p>	<p>Coach and Maintenance Orders: Write down the names of Coach and Client Maintenance orders.</p>
<p>I.</p>	<p>Coaches Working Toward Senior Coach: Write down the names of Coaches who are ACTIVELY moving toward Senior Coach. Start with the Coach who has the most business, growth and/or activity and list each Coach in chronological order (from left to right) based on their activity level and potential. These are the Coaches you will work with to help them get five Clients or more this month.</p>