

# Mary Kay Office Organization

## Simple & Effective

### Items to purchase:

- 4 Large 2” Three ring binders
- 8 ½ x 11” January – December Tabbed Dividers
- 2 packs of 8 ½ x 11 Graduated Tabs
- 5” x 9” Note Card Box for Profile Cards
- Plastic Sheet Protectors
- A-Z tabs to fit that 5x9 box
- Small Accordion for Customer Service system
- Hanging File Folders (start with 17)
- Portable hanging file folder box (or use a file cabinet if you have one)
- 2 : 12 packs of 9 x 12 Manila Envelopes
- 3 ring hole punch
- 2 spiral notebooks (one “1 subject” and 1 “5” subject)
- Emergency “Car Pack”
- Boulevard Software for customer & inventory tracking (OPTIONAL)
- Ascend Financial software for money management (OPTIONAL)

### Steps to setting up your office:

✓ **2” Binder: Time BINDER!**

This becomes your “to-do” book. Lists your weekly plan sheet and your daily To do tasks. It can house your phone #'s of your team and customers.

✓ **2” Binder: Label this “Finance”**

Insert your letter size January thru December tabs. This is where you’ll be tracking All incoming sales & deposits & activity.

***Incoming:*** here is where you keep all your pink sales slips (put into a sheet protector until deposit is made are recorded. My slips are generated on the computer using BLVD software so I 3- hole punch mine and put mine here until deposit day.

***Outstanding*** (this is where you keep all your outstanding (not paid yet) sales slips to collect on) Put these in a plastic sleeve or 3 hole punch .

***Propay sales*** that have a spot to track those sales slips that used a credit card Again use a plastic sleeve or 3 hole punch until you deposit the money into your account.

***Deposits:*** You will be using your “Create a Deposit” slip and track those here. Use your Jan-Dec. tabs here.

You will learn that in Money Leadership class.

***Weekly Accomplishment Sheets :*** (even a -0- week!) this keeps you fiscally responsible to know what is happening each and every week. Most importantly it will be way for you track your averages quickly and efficiently.

- ✓ **2” Binder: Label this your MILLION Dollar Brain Book**  
 This binder is where you keep (Using 4 tabs)  
*A Prospect list* (use the page behind method)  
*A Recruit Prospect list* (use the page behind method).  
*Teamwork Section* (listing your team & a page for each gal with her goals)  
*Hostesses:* Put your “Full Circle Success” sheets to here to track your hostesses!
  
- ✓ **2” Binder: Label this SCRIPTS**  
 Keep all “scripts” in this book for easy reference or for on the go so that  
 You can “*Say it like a pro*” to get the results you desire! Before long  
 Those words become your own.....and this book gets put away!  
 (option: Tab for easy reference: guest event, power start, recruiting, etc)
  
- ✓ **5”x 9” Box with A-Z filing tabs : This is your PROFILE station**  
 Use this to put your “hard” copy(bottom portion) of your profiles in  
 Alphabetical name by their last name. You can add the “bank” copy of the sales  
 Slip in behind each person’s name , adding her most recent purchase stapled to the  
 Top (thus keeping a running track of her product history and buying pattern. If using  
 Blvd. software you won’t need that.
  
- ✓ **Small Accordion: This is your Customer Service System**  
 This will be where you’ll place the “top” flimsy copy (I cut off the left side and just file  
 the right half)of the profile in a  
 Jan-Dec. system. Placing these by the “Birthday” month of your customer.  
 You will be learning in training how to follow up on a timely basis  
 With your customers using this accordion.
  
- ✓ **20 Hanging File Folders & Portable Hanging file folder crate (or filing cabinet IF YOU HAVE ONE!)**  
Label the files:  
 Booking/Coaching, Time Management/ Weekly Plan sheets, Image & Attitude,Team  
 Building, Customer Service, Organization, Class procedure, Creative Selling Ideas,  
 Money Leadership, Career Conference, Fall Advance, Seminar, Power Up, Star  
 Consultant/ Star Night , Applause, Car, Red Jacket, Team Leader, Future Director,  
 DIQ, Director. You’ll add more  
 as you grow.  
**This is where you place your notes, handouts, and info on these topics for easy  
 retrieval. BRILLANT!**
  
- ✓ **2: 12 Packs of 9x12 Large Manila Envelopes:**  
**Makes Tax time a BREEZE!**  
**THE FIRST ONE:**  
 Keep your monthly expense receipts in this. Tally expenses at the end of the month  
 and place totals on Monthly Financial (find this on [www.marykayintouch.com](http://www.marykayintouch.com) left

column drop down box “learn mk” then to managing your business then managing money (expense tracking sheet: COPY 12 for the year) attach this to the front of each envelope.

**THE SECOND ONE:**

Keep all your pink sales slips for the month in this. I put the totals for my month on the front. Total sales January 2007 = \$ 1700.00

✓ **Spiral Notebooks:**

The “1” subject: Put on your desk as “Phone Log” calls received message log.

The “3” subject one is on your desk as a **MENTAL CONSOLIDATION** book

**First section: Things to do this week (then you plug them into your “time binder”)**

- a. High priority (people tasks)
- b. Medium priority (paper tasks)
- c. Low priority (delegated tasks)

**Second section:** Personal things I want to do (family related)

(example: new curtains for house, plant flowers, oil changed )

Third section: Dreams!

✓ **Emergency Car Pack:**

Use a small plastic tote to put in these items as “back ups” : Foam trays, applicators, look cards, facial cloths, recruiting packets, hostess packets, beauty books, look books, sales slips.