

Assess Your Team

If you want to take your business to the next level, you need to know how well you and your team are doing right now. Use this worksheet to take inventory of team performance on critical business-building activities.

Rate your frontline leaders on each of the listed activities. Based on the results, identify which of your leaders need extra mentoring. Fill out a new sheet for each leg.

Leader's name: _____ Date: _____

PIPES ACTIVITIES	Never	Rarely	Sometimes	Usually	Always	Action Needed
Prepare	1	2	3	4	5	
Sets goals	1	2	3	4	5	
Makes a names list	1	2	3	4	5	
Schedules classes ahead of time	1	2	3	4	5	
Invite	1	2	3	4	5	
Consistently works names list	1	2	3	4	5	
Present	1	2	3	4	5	
Holds one-on-ones and classes	1	2	3	4	5	
Books classes from classes	1	2	3	4	5	
Enroll	1	2	3	4	5	
Enrolls with a kit	1	2	3	4	5	
Holds Lifestyle Overviews	1	2	3	4	5	
Holds Business Overviews	1	2	3	4	5	
Support	1	2	3	4	5	
Follows up with customers	1	2	3	4	5	
Finds builders	1	2	3	4	5	

CUSTOMER RETENTION	Never	Rarely	Sometimes	Usually	Always	Action Needed
Has an onboarding system	1	2	3	4	5	
Educates about kit	1	2	3	4	5	
Enrolls customer in LRP	1	2	3	4	5	
Has a customer community	1	2	3	4	5	
Facebook group, Instagram page, etc.	1	2	3	4	5	
Continues educating customers	1	2	3	4	5	
Provides product training	1	2	3	4	5	
Connects to dōTERRA education (webinar, podcast, etc.)	1	2	3	4	5	
Communicates promotions and special offers	1	2	3	4	5	
Works to reactivate customers	1	2	3	4	5	
LRP campaigns, additional Lifestyle Overviews, special offers and promotions, etc.	1	2	3	4	5	

BUILDER RETENTION	Never	Rarely	Sometimes	Usually	Always	Action Needed
Has a new builder launch system	1	2	3	4	5	
Hosts Launch Camps	1	2	3	4	5	
Introduces Empowered Success materials	1	2	3	4	5	
Creates a builder community	1	2	3	4	5	
Weekly team call/webinar, weekly leader call, team trainings, recognition, weekly emails, etc.	1	2	3	4	5	
Incentivizes growth	1	2	3	4	5	
Provides enrollment incentives	1	2	3	4	5	
Leverages corporate promotions	1	2	3	4	5	
Organizes challenges and campaigns	1	2	3	4	5	
Mentors builders	1	2	3	4	5	
Strategizes with builder one-on-one or in a group	1	2	3	4	5	
Regular Success Check-ins	1	2	3	4	5	
Provides rank-specific training	1	2	3	4	5	
Sets rank advancement goals	1	2	3	4	5	
Provides resources	1	2	3	4	5	
3-way calls	1	2	3	4	5	