

# Genealogy Projection and Reporting Workbook

Overview: This genealogy projection workbook is a fully automated, Excel-based reporting solution designed to streamline monthly performance tracking and projections for sales organizations. It is built with easy-to-use buttons, user-friendly dropdowns, and dynamic filtering tools that adapt to any reporting period — including retroactive months — and is fully Mac and PC compatible.

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## Benefits for Users:

- Save HOURS each month with automated reports
  - Easy to use - does not require you to be a tech whiz or know much about spreadsheets.
  - Empower team leaders with crystal-clear projections
  - Gives accurate and reliable data that helps you to easily isolate and identify areas of opportunity in your business. (Easy to get targeted lists for team enrollment, customer follow up/1 on 1 reach outs, broadcast messages, or email lists, etc).
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## Key Features:

### One-Click Report Generation

- Generate all reports in seconds via a master “Run All Reports” button
  - **Monthly Projection Table** to help you goal set for the month and have a better idea of where you are/will end up based on your most current genealogy upload. Automatically calculates projected points, projected outside leg points, average points per order, rank advancement thresholds, # of points to next rank, # of orders to next rank.
  - **Team Enrollment Data** - Shows you who is enrolling new VIPs, how many VIPs they are enrolling, how many have + or - 100PV for their first order, how many of their enrollments have subs on or off, and the names of their VIP enrollees. Provides one easy to read/sort report
  - **Eligible To Restart** - Includes all Customers that are clearly eligible to have their accounts cleared and start new (account is at least 12 months old and it's been at least 6 months since their last order date).
  - **No order 2 Calendar months** - Includes all customers that did not have an order for the past two calendar months but did the month before that.
  - **Under 100PV** - Includes all customers that will have 100pv by the end of the month by combining their PV and Subscription PV for the current month.
  - **No Order Not Eligible To Start New** - Includes all other customers that have not yet shown up on the other reports that do not have PV for the current month and do not have a subscription OR their subscription is pushed out.
  - **Downline Projection Tool** that allows you to select a Paid Sr Silver or above brand ambassador from a dropdown list, automatically (and accurately) pulls their genealogy information from your own genealogy so you don't have to worry about finding or downloading reports for anyone else, and allows you to generate projection tables for your team - all inside the same workbook from just one report!

## **Other Unique Features:**

### **Dynamic Date Handling**

- Easily select any report month via dropdown — even past months
- All logic and outputs adjust automatically based on selected date

### **Dropdowns That Grow with You**

- Dynamic, auto-expanding dropdowns for business builders and dates
- Eliminates the need to manually adjust list sizes

### **Centralized Data Input**

- Paste genealogy data into a single sheet (“Genealogy Data”)
- No need for manual filtering or formulas.

### **Smart Leg Logic for Outside Leg Calculation**

- Analyzes downline structure to determine strongest/primary leg
  - Allocates points to outside leg using dynamic downline tree logic
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## **Purchase Options:**

### **One Time Purchase: \$149.95**

- Includes Workbook and Instructions
- Does NOT include free access to future updates/enhancements/fixes. (Will get update only if corporate updates their reporting within the first 30 days that affects the usability of the workbook.)
- Will have to re-purchase if an update or enhancement is released that you would like to have access to.

### **Discounted initial purchase with Subscription: \$99.95 + \$9.95/mo subscription**

- Includes Workbook and Instructions
  - Includes free one-on-one Zoom help session and/or team workshop if several team leaders will be utilizing this tool.
  - Includes free updates, enhancements and fixes as long as you are a subscriber. (I’m always adding features and making this tool better and better and will update this workbook if back office reporting changes).
  - Includes access to other smaller tools and resources that I create and send out to subscribers.
  - Subscription can be cancelled at any time.
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