

# **Shaklee Conversation App** User Guide

For use with version 1.11 of the Shaklee Conversation App.
Last updated March 28, 2012

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Every effort has been made to ensure that the information contained in this document is true and correct at the time of publication. However, the systems, processes, specifications and content in general described in this document are subject to continuous development and Shaklee Corporation is entitled to change and expand on them at any time.

All names and other data used in examples are fictitious.



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#### **Purpose of the Shaklee Conversation App**

The Shaklee Conversation App was designed to facilitate a two-way conversation between Shaklee Distributors and their prospective customers and distributors. While the App can be connected to a TV or big screen theater for group presentations, it is *primarily* designed to facilitate one-on-one conversations. The goal of this conversation is twofold: 1) for the Distributor to communicate what Shaklee offers, and the benefits of joining, and 2) to facilitate the development of a long-term relationship between the Distributor and the Prospect through an interactive conversation.

The app includes support tools such as Speaker Notes and FAQs to support new users who are still learning to share Shaklee in their own words. There are also numerous interactive hot spots and videos embedded in the app – depending on your guest's interests, you may want to linger or skip over these features. By no means are we suggesting you use all the videos and hot spots in your conversations – otherwise, your conversation may take two hours or more! But, we do recommend you familiarize yourself with all of these resources embedded in the app so you can call upon them as needed to identify and explore your guest's individual interests. This User Guide can help you learn which tools are available where, their purpose, and how/when to use them.

#### Purpose of the User Guide

This User Guide was designed to document and demonstrate how to install and use version 1.11 of the Shaklee Conversation App. In this User Guide, you will:

- Learn how to install the app.
- Become familiar with the Presentation, its main features, and how to access hidden features.
- Learn how to troubleshoot common iPad problems that may interfere with the App.

This is a working document. If you encounter an undocumented feature or bug, please let us know by emailing <a href="mailto:fieldsupport@shaklee.com">fieldsupport@shaklee.com</a>.

When bugs are resolved, we will update the App and the User Guide. Currently, version 1.11 of the Conversation App has two known bugs, which we are working to resolve:

- For some iPad 1 users, the app crashes when you use Chapter View.
- For some iPad 1 users, the app crashes when you use Slide View.



#### Installation

#### **Installation from your iPad:**

- 1. Use Safari navigate to myshaklee.com
- 2. Log in to myshaklee.com with your username and password
- 3. Click on the My Business tab
- 4. Click on Marketing Tools
- 5. Under "Apps and Widgets," click on Shaklee Conversation App
- 6. Click on the green "Install to iPad" button
- 7. The app will begin to download and install directly to your iPad. A Shaklee icon will appear on your iPad with a progress bar indicating the progress in installation.
- 8. When installation is done, tap the Shaklee icon to load the application.
- 9. The first time you use the application, you will be prompted to enter your myshaklee.com user ID and password. After this first use, you will only be asked occasionally to re-enter and verify your user ID and password. The login is required in order to process memberships at the end of the presentation. If multiple users will use the App, be sure to log in/out to credit the membership to the right ID.

NOTE: Due to the media-rich content, this app is very large (1.1GB). Therefore:

- If you have a 3G service plan (even "unlimited"), we strongly recommend downloading via WiFi rather than risk going over your plan's data limits.
- Depending on the speed of your connection, it could take over an hour or more to download. Be sure you can stay connected for at least an hour to ensure download and installation is completed. If possible, we recommend you start the download and installation before going to bed at night, when network traffic is quieter and therefore can be faster. Your app should be ready to go when you are in the morning!
- If you cannot install via WiFi, use the alternate method described below.

#### Alternate Installation – Installing via iTunes:

To install the iPad app from your PC:

- 1. You must have iTunes installed on your PC. If you don't have iTunes installed, go to <a href="https://www.apple.com/itunes">www.apple.com/itunes</a> to download and install this free App to your PC.
- 2. To download the Shaklee Conversation App to your PC desktop:
  - a. Follow steps 2-5 above.
  - b. On the App page, under Please Note, you will see 3 bullet points. At the end of the 3<sup>rd</sup> bullet point, there is a "Click here" link to access the alternate download. Click it.
  - c. Scroll to the bottom of the pop-up window and click on the green "download" button to download the App to your PC, then follow the step-by-step instructions in the pop-up window to install the App from your PC to the iPad via iTunes.
- 3. When installation is done, tap the Shaklee icon to load the application.
- 4. The first time you use the application, you will be prompted to enter your myshaklee.com user ID and password. After this first use, you will only be asked occasionally to re-enter and verify your user ID and password.



#### **Home/Landing Page**

This is Home, also known as the landing page. When you click the app's Home icon from within any other part of the App, this is where you'll return.



From Home, you can access 3 areas:

- 1. Presentation provides access to the presentation at the start of its recommended linear order.
- 2. Chapters allows you to jump to the start of a particular Chapter within the Presentation. Chapter View is designed to assist anyone who prefers to show the Presentation in a different order. For example, if you prefer to share the Opportunity before Products, you can do that from Chapter View.
- 3. Extras is where you personalize the My Story portion of the presentation, and access additional tools such as Success Stories, FAQs and the Dream Calculator. While you may not have need for these tools during your main conversation, you may want to use them for shorter conversations or as follow-up to your main conversation.

In the lower right corner of the Landing Page, we list the current version next to the copyright notice. The current version is version 1.11. If your app does not show the version number, or shows a version number lower than 1.11, we recommend you delete the app and install the version 1.11.



#### **Using the Presentation**

Once you have personalized and selected My Story pages from Extras, those pages will appear at the beginning of your presentation. If you have not selected and personalized your **My Story** pages (see page 36 for instructions), the presentation starts here.



At the bottom of every page, the **Toolbar** has 3 icons:

- 1. Home tap once to exit the presentation and return to the Home/Landing Page.
- 2. Speaker Notes tap once to reveal Speaker Notes at the bottom of your screen.
- 3. Slide View tap once to pull up Slide View at the bottom of your screen.

Speaker Notes were designed to support Distributors who are still learning how to share Shaklee in their own words. If you're ever at a loss for words, tap on Speaker Notes. Speaker Notes are not editable, and the pop-up window is not expandable. If the notes are longer than the pop-up window, a scroll bar will appear – swipe up or down as needed to read longer Speaker Notes. Tap the Speaker Notes icon again to hide it.

Slide View shows a thumbnail of all the slides in the presentation, with Chapter Heads underlined. To scroll through the thumbnails, swipe across them – from right to left to advance, and left to right to go back. If you want to jump to another slide, tap that slide's thumbnail. Tap the Slide View icon again to hide Slide View.

When you are ready to advance to the next page, simply swipe the screen from right to left. To go back, swipe from left to right.





#### What's Important to You?

You can interact with this page two ways:

- Tap on the black and white arrows on either end of the image.
- Or, tap on the keywords listed below the image.

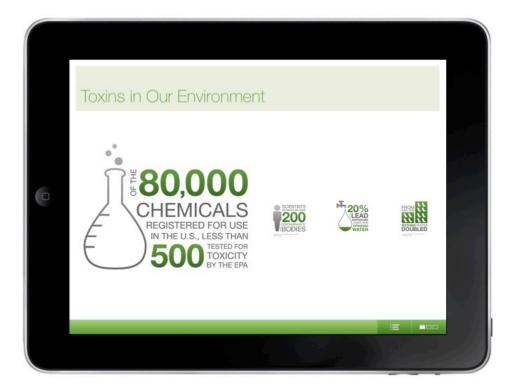
This page is a perfect example of how the App was designed to facilitate a two-way conversation. Eventually, when you're more comfortable and familiar with the App, we encourage you to hand the iPad to your guest and let them navigate. Notice what they tap, where they linger, and when they skip.



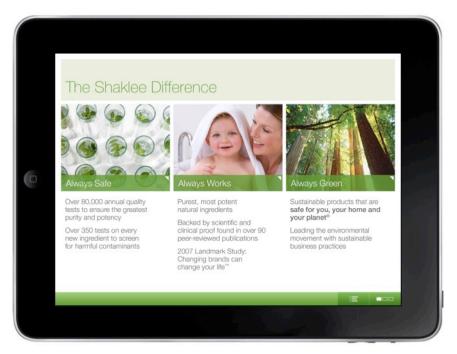


#### **Control Your Health & Toxins in Our Environment**

You can speak to these two pages as is, or you can keep yourself moving by tapping on each of the statistical images. When you do, that statistical image is enlarged. Tap again to shrink the image, or tap the next image.







#### The Shaklee Difference

There's enough information on this page to speak to the Shaklee Difference, and move on. However, if you or your guest are particularly interested in one of these three topics, tap on the white arrow in the corner of the Always Safe, Always Work or Always Green caption to reveal a pop-up with more examples to reinforce that particular point. For example, below is what the Always Works pop-up looks like.



To close the pop-up, tap the "page close" icon in the lower right corner (green triangle inside a square). You must close the pop-up to return to the presentation and advance to the next slide. If you attempt to advance from within the pop-up, you will cycle through the three pop-ups related to the Shaklee Difference slide.

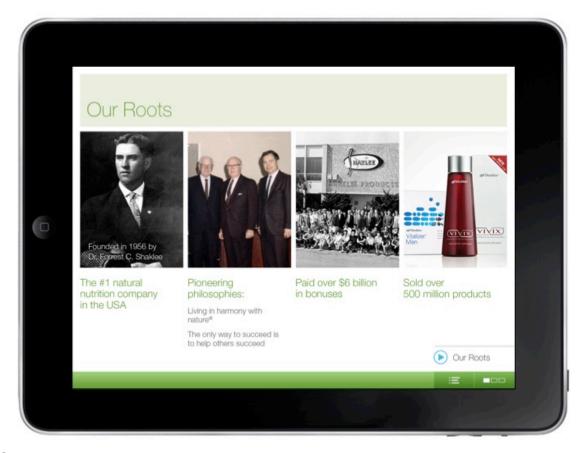




# **Naturally Safe, Proven Effective**

There are no hidden features to this page.





#### **Our Roots**

This is the first slide in the 3<sup>rd</sup> chapter, Our Roots. The only interactive feature is the embedded video available in the lower right corner.

#### A note about videos

There are over 60 videos embedded within this App, all but one of which have been edited to two minutes. Of the 60 videos, only 4 are featured. By no means do we recommend you show all 60 videos during your Conversation – otherwise, your Conversation might take hours! However, embedded videos are placed discreetly on certain pages where, depending on your guest's interests, they might be of help. Sometimes, you might not even have to watch the whole video – it may be enough to show 15-20 seconds to recognize or acknowledge an interest. We do recommend you play the three featured videos for everyone, as they have been designed to help you cover and transition through key points in the Conversation.

When a video is embedded on a page, you will see a blue play icon next to the video title (also in blue). When a video is featured, the play button additionally appears as a watermark over a key image on the page. There are three pages with featured videos:

- 1. Our Future features "Roger Barnett: Our Future."
- 2. What is Social Marketing? features two videos play the one you think is most appropriate for your guest:
  - a. "Moms Making a Difference"
  - b. "The Entrepreneurial Spirit"
- The Shaklee Difference and You! features "The Shaklee Difference."





# **Our People**

The only interactive feature on this page is the embedded video available in the lower right corner.



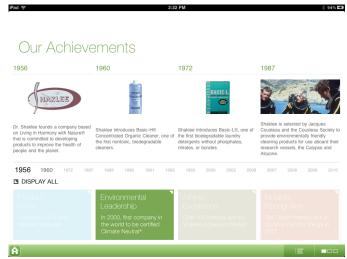


#### **Our Achievements**

This page is an interactive version of the two-page company timeline in the Shaklee Product Guide. In the same way that you probably don't read every paragraph of the Product Guide's spread, you probably won't read every paragraph of this timeline either. But, demonstrating the *volume* of content in each category can be impressive.

There are three ways you can interact with this page:

- As you speak to each of the four categories at the bottom of the page, simply swipe across the images on the timeline to give a sense of the volume of achievements.
- 2. If there's a particular achievement that you are particularly proud of, or that you think would be interesting to your guest, you can tap on the year in the timeline to jump to that period and speak to that event.



3. You can also tap on any one of the four categories to sort the timeline and display only those related achievements. For example, if your guest is interested in greening their life, tap on the white "open" button in the upper right corner of the green Environmental Leadership box to display only our green achievements.

When you are ready to leave this page, swipe across the top of the page.

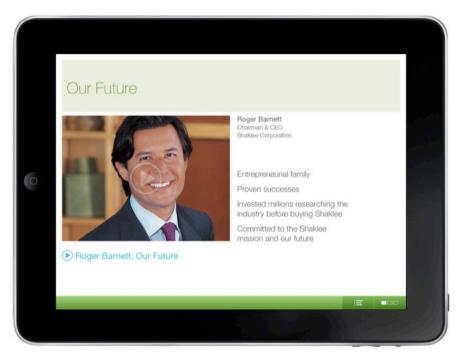




#### **People Are Talking About Shaklee**

The only interactive features are the embedded videos available for three of the people featured on this page. Again, you may not want to play the whole two-minute Oprah video – but you might want to play just a few seconds to prove we were featured on Oprah's show.





#### **Our Future**

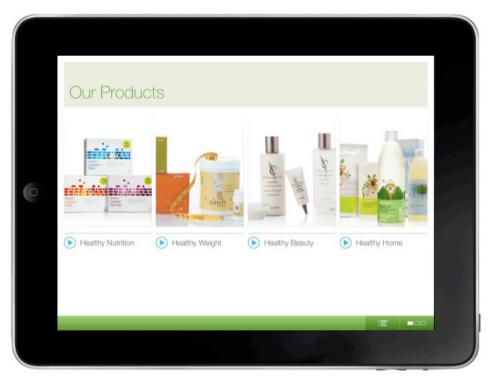
This page contains the first of three featured videos. You can tell it's a featured video because in addition to the blue play button next to the video title, there is a white play button watermarked over the photo.



# **Changing Brands Can Change Your Life**

This is the first page in the Our Products chapter. There are no interactive features on this page.





#### **Our Products**

The only interactive features on this page are the embedded videos for each category.



# The Shaklee Guarantee

There are no interactive features on this page.





#### What is Social Marketing?

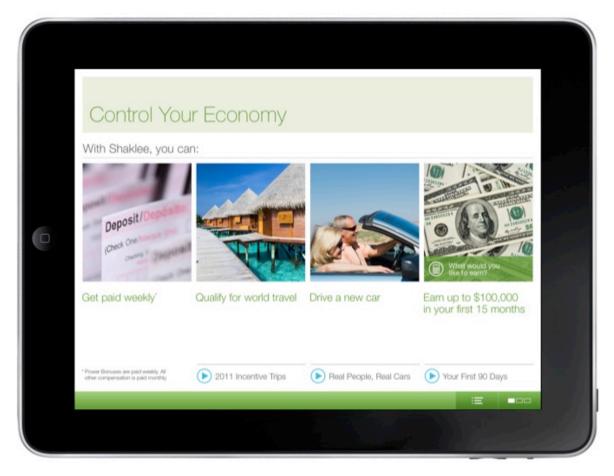
This is the first page in the Our Rewards chapter. There are two featured videos on this page. Play the one you think is most appropriate for your guest.



#### **Today's Economy**

This page functions the same way as Control Your Health, and Toxins & the Environment: You can speak to these pages as is, or you can keep yourself moving by tapping on each of the statistical images. When you do, that statistical image is enlarged. Tap again to shrink the image, or tap the next image.





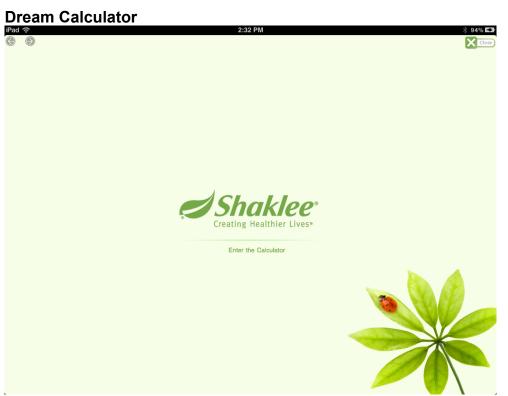
### **Control Your Economy**

Embedded on this page are three videos and the Dream Calculator. To access the Dream Calculator, tap on the calculator icon in the "What would you like to earn?" caption. To exit the calculator and return to the presentation, tap the X in the upper right corner of the calculator.

This is another good place to notice if your guest seems interested in knowing more. If so, you might want to play a video or use the calculator to explore their interest now, or simply note it for later follow up.

See next page for details on how to use the Dream Calculator.





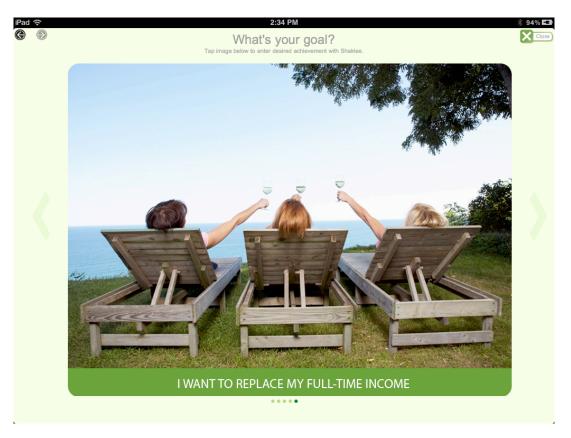
This is the landing page of the Dream Calculator. Tap the Shaklee logo in the center of the page to enter the Dream Calculator.





This is the Main page of the Dream Calculator. In the upper left corner, the Calculator asks "What is your goal?" You have a choice of discussing goals in terms of lifestyle or cash. The default is set to display lifestyle goals.

To discuss goals in terms of lifestyle, you can swipe through the images at their current size, or you can tap on the image to size up to full-frame. To page through the images at full-frame, you need to tap on the light green arrows to the left or right of the image.



Tap the image that best matches your guest's goal. If you were in full-frame mode, you will return to the Main Page.





Once you select the image that best matches your guest's goals, the calculator will display the results on the right, under Calculation Results. To display a diagram of a sample organization that would deliver those results, tap the green button "Show Sample Organization."



To exit the Sample Organization view, tap the green "Return to Calculator" button.



Back on the Main Page, in the bottom left corner, your guest can drag the slider to indicate how many hours they are willing to commit to their success. This data does not impact the calculator results. It is meant to help you to identify your guest's current level of commitment, and to advise them if their commitment level is out of line with the effort required to achieve their desired results.



Under the green "Show Sample Organization" button, there are three gray buttons that allow you to RESET, PRINT, or EMAIL your guest's results. When you email them their results, be sure to cc yourself so you have a record for future follow up.

To exit the Dream Calculator and return to the presentation, tap the "X – Close" button in the top right corner.

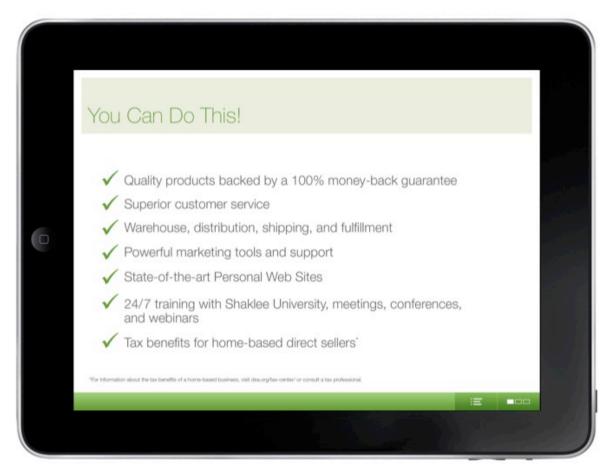




# **Real People Making Real Money**

The only interactive features on this page are there are three embedded videos: one lifestyle profile video for each of the three blue highlighted ranks.



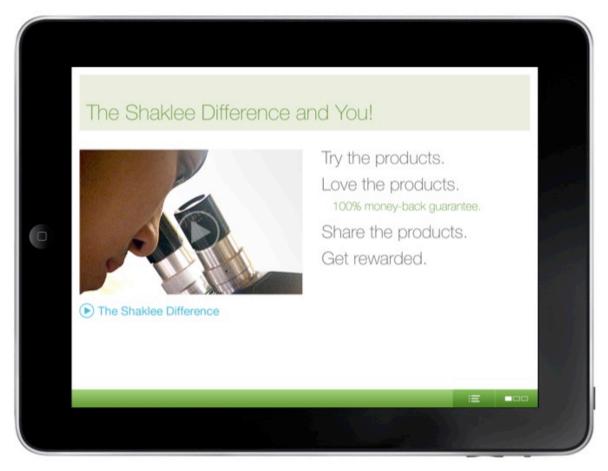


#### You Can Do This!

In the disclaimer, you will notice a URL for more information on the tax benefits for home-based direct sellers. Tap on the URL, and you will get a pop-up connecting you through to that webpage. If someone perks up at the mention of tax benefits, you may want to show them this webpage and let them know it was created by the Direct Selling Association in partnership with the IRS. On that webpage, you can forward an email to your guest so they can look over the information in detail on their own time. For now, just let them know this information is readily available for further investigation at their leisure.

Please note: You need a live connection to the internet for this feature to work.

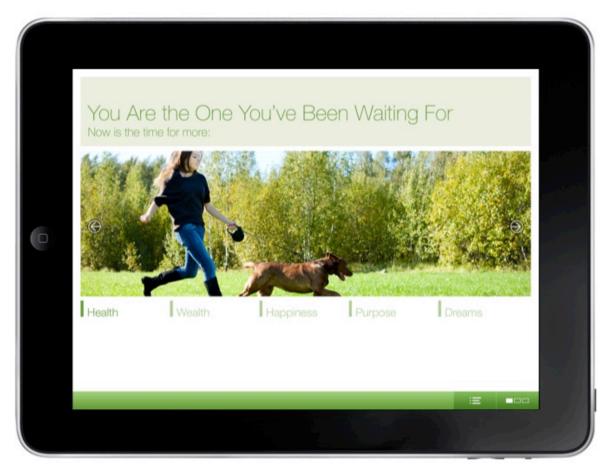




#### The Shaklee Difference and You!

This is the first page in the last chapter, Join Us. The only interactive feature is the featured video. Be sure to play this video, as it was designed specifically to help you recap your presentation and make a smooth transition to closing the conversation. Take a look at the Speaker Notes for suggestions on how to wrap up your conversation.





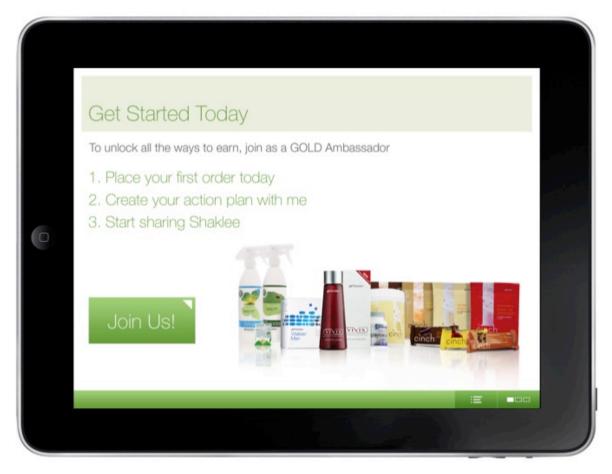
### You Are the One You've Been Waiting For

This page helps you wrap up your Conversation in a way similar to how you began it – by getting to know your guest's interests better. After they've heard all that Shaklee has to offer, now what are they *most* interested in? Again, when you're more comfortable and familiar with the App, we encourage you to hand the iPad to your guest and let them navigate. Notice what they tap, where they linger, and when they skip.

You can interact with this page two ways:

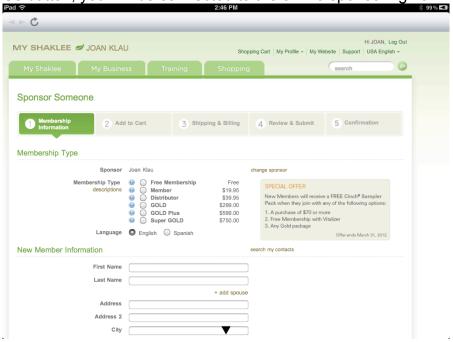
- Tap on the black and white arrows on either end of the image.
- Or, tap on the keywords listed below the image.





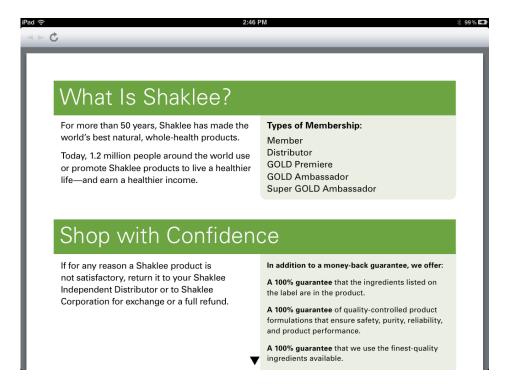
# **Get Started Today**

This is the last slide in the presentation. The only interactive feature on this page is the Join Us button, which requires a live internet connection. When you tap the green Join Us button, you will be connected to the online sponsoring flow in myshaklee.com.





If you're not familiar with all the Membership Options, or you'd like a cheat sheet to show all the details of the different options, be sure to click the question mark icon next to "Membership Options." This will pull up a PDF of the Membership Options flyer. Now you can walk through the details of the Membership Options you're offering. When you're ready to sponsor them, simply fill out the form following the same process as if you were sponsoring online – because you *are* sponsoring online! To exit the PDF, tap the black triangle at the bottom center of the screen.

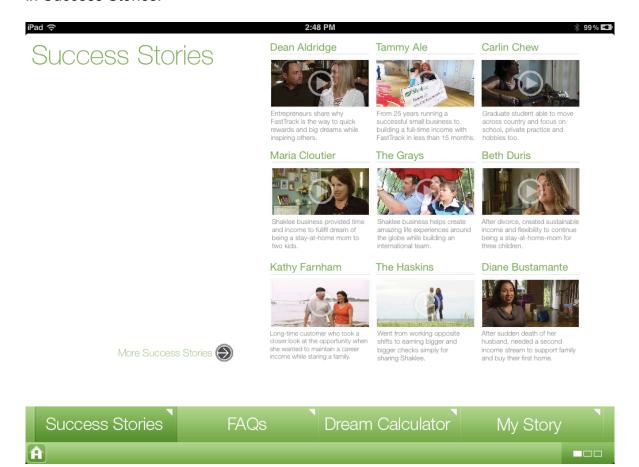


The Join Us function only works if you have a live internet connection. So, plan ahead when making your appointment to meet where you'll have internet access, and/or carry a hard copy of the Membership Application as backup.



#### **Tour Extras**

To access the Extra features, tap Extras on the Home page. The default is set to land in Success Stories.



#### **Success Stories**

There are two pages of Success Stories. Tap the black and white arrow to switch between the Success Stories pages. To play a video, tap it. To exit a video, tap DONE in the upper left corner. Take time to familiarize yourself with the diversity of stories, so that you can play the appropriate story for each guest.





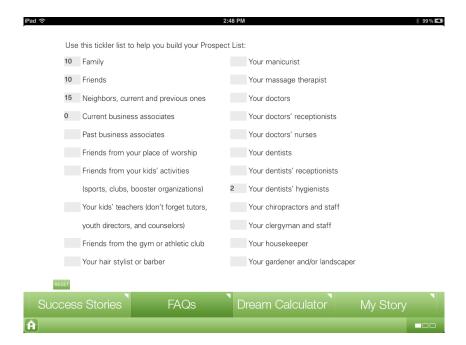
#### **FAQs**

Using third-party testimonials or an objective questionnaire, each of the five FAQs was designed to help Distributors respond to some of the most frequently asked questions and overcome objections succinctly and confidently, without becoming defensive.

The first two FAQs are video responses. The last three FAQs are questionnaires for your guest to fill out. We recommend you hand the iPad to your guest, and give them a moment to fill the form out on their own. When they are done, you can use the form's EMAIL, CALCULATE or RESET buttons as needed.

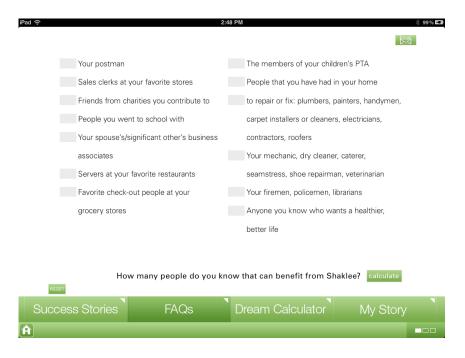
"What is your business model?" and "Can I succeed if I'm not a salesperson?"
One fun fact you may want to share as a preface to showing these videos: All of the people featured in these two videos were filmed at a New Directors Conference. That means within six months of filming, they were just like your guest, evaluating the business for the first time, and yet they've already reached at least the first level of success, Director. As you can see by their IDs in the video, some of them had already surpassed Director by the time they attended the New Directors Conference.



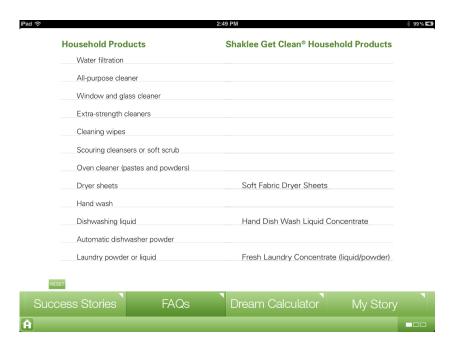


#### "How many people do I need to get started?"

If someone is questioning whether they know enough people to build a business, hand them this memory jogger. When you tap in the box next to a category, you can input a number. Swipe to the second page to access the EMAIL and reset buttons. The CALCULATE button will calculate how many total people they know. The EMAIL button allows you to email them the list of how many people they know in only those categories they selected. Remember to cc yourself so you have a record for follow up. The RESET button clears the form for your next guest.







#### Shaklee-ize Your Life!

If someone questions whether they would really use any Shaklee products, hand them this generic shopping list and ask them to tap next to the items they currently own, or will buy this week/month. As they tap a generic item, the Shaklee equivalent will appear on the right side of the screen.



This questionnaire is several pages long, but be sure to swipe to the end where you can EMAIL them their shopping list (don't forget to cc yourself so you can follow up), or RESET the form for your next guest. If they don't buy all the products they checked off during your first appointment, this form gives you a great lead on what areas to focus on during follow up.



#### "How much time do I need to build a business?"

If someone questions whether they have time to build a Shaklee business, ask them to fill out this calendar form. Depending on how much time they are willing to be available versus are not available, you can talk to them about how much the average Director earns working part-time versus the average Master Coordinator who works full-time.

The instruction for how to use this form are included on the form itself.

#### **Questionnaire tip**

Always offer to email a completed form to your guest as a reminder of what you discussed. Be sure to cc yourself on the email, so you have a record of the conversation for future follow up. If they don't want it emailed to them, don't reset the form yet – wait until after the appointment to email it to yourself. The App will store your last user's input until you hit RESET.

#### **Dream Calculator**

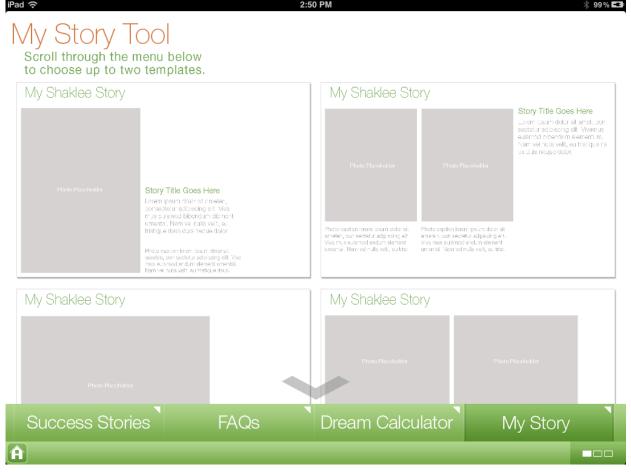
The same Dream Calculator that's available within the Presentation is also available from Extras, for faster access and/or shorter Conversations. See page 19 for details on how to use it.



#### My Story

To insert photos into My Story, you need to have photos stored in your iPad Photo Library or Camera Roll first. You can transfer photos from your PC via iTunes, or you can use a free app like DropBox to upload them to your iPad Photo Library.

You can customize and insert up to two of the five My Story template pages into your presentation. You can also customize all five template pages, and then change which ones are selected for insertion to best match your guest's interests.



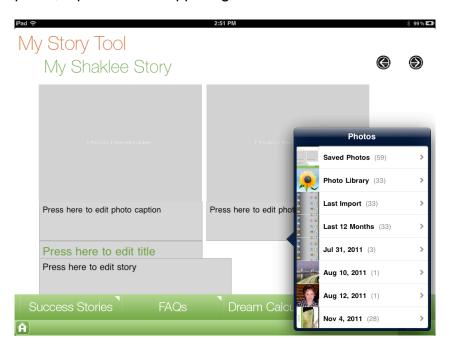
When you tap My Story in Extras, you land in the Template Selection page. Use the gray arrows to scroll through the 5 template options. Tap once to select a template. Doubletap to unselect a template. You can select a maximum of two templates for insertion into the presentation. You cannot use the same template twice. If you'd like to populate all five template pages, you need to do select and populate two at a time, then unselect the two templates you populated and select two new templates to populate. Repeat this process until all five templates are populated.

Once you've selected two templates, tap the black and white arrow icon in the upper right of the screen to start populating your first template page.





To insert a photo, tap on the gray box labeled Photo Placeholder. A list of your stored photo folders will appear. Navigate to the folder, then photo you want to insert. You can move and scale the photo using the tools provided. Once you are happy with your photo, tap Use in the upper right corner.



Each template also has text boxes for photo caption(s), a title and your story. Space is limited, so be judicious with your story. Remember, this is a conversation, so you'll be able to say more than you can write here. Keep it short and simple, but include key words you want to remember to share. If you prefer to leave a text box empty, type a blank space into the text box to clear the placeholder copy. To protect against losing



your data, we recommend you write and save your captions, titles and stories in another application, like Notes or email.

Once you fully populate the photo and text boxes on your template pages, use the black and white arrows to back up to the Template Selection page. If you have populated more than two templates, make sure the templates you want to display are selected. Now tap the Home button, and then the Presentation. Your My Story pages should now appear at the beginning of the presentation.

To remove My Story from your Presentation, simply return to My Story in Extras, and unselect those templates.



### **Troubleshooting**

Because the Shaklee Conversation App is a media-rich app, it can compete with other apps running in the background of your iPad. To prevent overtasking your iPad and crashing the Shaklee Conversation App, we recommend you close all other non-essential apps before using the App.

To close non-essential apps:

1. Doubletap the iPad Home button.



2. This reveals a dock of actively running apps. Tap and hold on any one of the currently running apps, until they start to wiggle and a small red minus sign icon appears in the upper left corner of the apps.



3. Tap the minus sign on all the apps you want to close.





4. When you are done closing apps, close the dock by doubletapping the iPad Home button.



#### Reporting problems

This is a working document for a first generation app. If you encounter an undocumented feature or bug, or an error in this User Guide, please let us know by emailing fieldsupport@shaklee.com.

When bugs are resolved, we will update the App and the User Guide. Currently, version 1.11 of the Conversation App has two known bugs, which we are working to resolve:

- For some iPad 1 users, the app crashes when you use Chapter View.
- For some iPad 1 users, the app crashes when you use Slide View.

#### **Quick Start Guide**

- 1. Install the app.
- 2. Log in with your ID & password.
- 3. Make sure you have the photos you want to use for the My Story pages loaded on your iPad.
- 4. In Extras, go to My Story. Select up to 2 template pages and customize them with your personal photos and your story.
- 5. Enter the presentation to check that your My Story pages display as desired.
- 6. Start having conversations!