



## Step 4: INVITE



*Begin with people who you know will be **supportive and open** to you.*



## Step 4: INVITE

Learning how to approach, invite, and set the appointment is vital to your success. Informal Shaklee conversations are wonderful seed-planters, but they aren't nearly as effective as actual invitations to **make an appointment** to hear about Shaklee. If you are using Shaklee 180™ to introduce prospects to Shaklee, follow the process identified in the Shaklee 180™ Specialist Start-up Guide and use the invite process specified for Shaklee 180™.

### ACTION STEPS

#### ☒ What to Do with People on Your Prospect List

- ☐ **Select names from the Prospect List.** To start with, asterisk about 15–20 names. Choose the people who you know will be most supportive and open to you—people you know you can count on to really hear you out. We'll call these people your Hot (you are close to them) or Warm (you are friendly with them) markets. We'll show you approaches you can use with your Cool (an acquaintance) and Cold (meeting for the first time) markets.
- ☐ **Write down what you want to say to approach them**—a type of script with some suggestions that take into account their needs and wants. Your Business Leader may be able to help you profile each person and help you determine how to best approach them. (See pages 35–37 for suggestions.)
- ☐ **Practice your invite script** out loud so it sounds natural.
- ☐ **Have the script in front of you** when you call.
- ☐ **Expect them to say “yes!”**; be enthusiastic.
- ☐ **Break the ice** (this is a relationship business!) and then mention something that might interest them, but don't go into detail.
- ☐ **If they have questions**, don't get trapped into explaining Shaklee on the phone. Just say: “I can't do you or the company justice in a couple of minutes on the phone. Let's get together over a cup of coffee for 20–30 minutes so you can understand my enthusiasm. I want you to know that 'no' is an OK answer and it's not going to affect our relationship in any way. Will Tuesday after work be OK?”
- ☐ **Your objective: to set a DATE, TIME, and LOCATION** for them to hear about Shaklee—NOT to explain all about Shaklee, the opportunity, or the products. That is done during the SHARE section. Just be NATURAL!

The more calls you make, the sooner you'll get the hang of it. Remember: You will be starting with your friends, so they will be supportive of you and be willing to be a resource.



## What You INVITE Them to

In your Distributor Orientation and Strategy Session, your Sponsor/Business Leader can help you decide what kind of event you will hold. Here are the possible events:

- ☐ **Hold Shaklee 180™ parties.** Follow the simple party process covered in the Shaklee 180™ Specialist Start-up Guide and Training videos. This is a great way to reach a lot of new people, change lives, and open the door to Shaklee products and the Opportunity.
- ☐ **Hold a Shaklee Grand Opening.** This is a meeting you will schedule right away in your home or a convenient location (can even be online) where you can introduce your family, friends, and contacts to Shaklee and find out what they may want to learn more about.
  - Start out by inviting as many as 20–30 people from your Prospect List to each group event—statistics show that, generally speaking, you’ll net about six to 10 at each event. (See Invite scripts for Grand Openings on pages 36–37.)
  - Plan something FUN! (Ribbon-cutting, open house, etc.)
  - The goal of your Grand Opening is to create interest in the Shaklee Opportunity and Shaklee products. (See SHARE, pages 42–49.)
  - It’s a good idea to set a minimum 3–4 dates. That way, if they can’t make the first date, you can say: “No problem, I have another one on \_\_\_\_\_. Can you make that one?” Just keep re-inviting them until you find one of the dates that works.
- ☐ **Talk to people one at a time (1-on-1).** This allows you to provide personal attention and helps you identify their special needs and wants. You can also conduct a 1-on-1 conversation by phone with people who live at a distance. (See recommended 1-on-1 scripts on pages 35–37.)
- ☐ **Bring a prospect to a Web meeting.** This can be conducted by your Business Leader or by you, depending upon your comfort level.
- ☐ **Offer to hold an In-Home event for people.** This is a meeting where they can invite their friends and contacts. This is a common approach that has worked successfully for a lot of Business Leaders in Shaklee when they started their businesses.

Your Business Leader or your Sponsor will be your primary resource during this time. They will often co-host your first events so you get an opportunity to see how it’s done! They can also advise you on the best resources and tools to use to help you present Shaklee effectively. Start right away to set up your meeting dates and times for inviting people to hear about Shaklee.



*Plan  
something  
fun to capture  
their interest!*



*Everyone wants  
what Shaklee  
is offering.*



## Step 4: INVITE



### What You Will Say to Invite Contacts from Your Prospect List

The following gives you suggestions for how to invite, drawn from the experience of top Shaklee leaders. If you are using the Shaklee 180™ Program, the process it specifies is designed to help ensure you maximize success with Shaklee 180™.

If you are approaching prospects outside of the Shaklee 180™ process, the following suggestions will be helpful as you develop your comfort level in inviting others to hear about Shaklee. Initially you can use this approach with your close contacts. Let them know you are reaching out to them because they are supportive and you would like to have them as your first audience while you learn how to do this new venture. No obligation, just hear you out. You'll be surprised at how supportive people can be.

Once you get comfortable, you can develop other words to say. Making an approach script can really help relieve your anxiety. Work with your Sponsor/Business Leader to get the language that will be right for you and your prospects.

**Remember, EVERYONE WANTS what it is we are offering.** Everyone wants to be healthier, feel younger, have a healthy home, keep a healthy weight, drive a new car, travel, and EARN MORE MONEY! Now, this does NOT mean everyone will TAKE ADVANTAGE of what you are offering, and that is OK. **Your objective is to INVITE people, then SHARE the story, then work with the willing.**

#### ■ The most important points to include in your invitation are:

1. Let them know you have been thinking about them. (This affirms their value.)
2. Mention the specific need you heard by listening to them.
3. Use phrases that make them feel comfortable—words that take down the wall of resistance.
4. Show passion for your business as you mention Shaklee.
5. Tell them how Shaklee has met YOUR need in a similar situation (rather than saying “this would be good for you”)
6. Include a couple of more “comfort” phrases.
7. Ask permission to meet.

**See next page to see how these points are used in an actual script.**



### Example using points from page 34:

**“**Hi, Anita. (chat) **(1)** I’ve been thinking about you since our conversation yesterday when you mentioned **(2)** you are looking for a way you can earn enough money to send your children to a private school next year. **(3)** I don’t know if you would be open to this, **(4)** but I have a business I absolutely love. It’s with Shaklee, a company that for 57 years has been a leader in the nutritional industry and for green products in the home. **(5)** It’s met my need to earn the extra money I wanted to pay for those kinds of special things for our children. **(6)** As I said, it might not be exactly what you are looking for, but **(7)** if you’re open, I’d love to meet and show you what I do. It could be something for you to think about. (Set time and place.)**”**

Set your  
prospect  
at ease.

### ■ Always use phrases that make your prospect comfortable

- This might be a match for the things you want...
- I don’t know if you would be open to this, but I’d love to get your opinion...
- I’d like to see what you think...
- I’d love to share some of my favorite products with you, maybe you’ll fall in love with them, too...
- I’m perfectly OK with “no” or “it’s not for me”...
- This might be a solution for...
- I’d love to show you what I do...
- It might be something for you to think about...

### ■ Open the door in an indirect way to invite interest and referrals:

- I’m interested in finding people who want greater control over their lives, ...who want more time with their family, ...who want to be their own boss, etc.
- Do you know of anyone who is looking to have greater control...?
- If it’s not for you, do you know anyone who...?



**Open the door**  
**in a way that**  
**meets their**  
**needs.**

## Step 4: INVITE

### Friendly product approach with contacts you know

#### Group product event—In-Home presentation

**“**Hi \_\_\_\_\_. (Brief, natural chit chat.) *I can't tell you how excited I am. I've been using some products from a company called Shaklee and I've noticed (I feel so much better **OR** I have so much more energy **OR** I switched to their non-toxic cleaners and I feel so much better about the baby around the house). In fact I'm so impressed that I've agreed to have a gathering at my house to let my friends hear all about Shaklee. It's on (date and time). I'd LOVE to have you come and see what you think. It'll be fun, no obligation, just a chance to meet some great people and learn about some things that might make a difference for you, too.*  
*Feel free to bring a guest; the more the merrier! Can I count on you to come?***”**

#### For a group product event—referencing a need they have

**“**Hi, Mary! (Brief, natural chitchat.) *I was thinking about our conversation last week about your concern for your kids' health. I know a lot of parents who have the same concern, so I'm having a gathering at my home next Tuesday at 6:30 p.m. and I've invited some great people. I'll be sharing what's been working for my family, including some products that I found really helpful. I'd love to have you come. There's no pressure to buy anything, just a chance to consider something that could be of help to you. Besides you'll meet some fun people and have a great night out. Can I put you down as coming?***”**

#### For a 1-on-1—meeting a stated need

**“**Hi, Terry. It's (your name). *How have you been? (Brief, natural chit chat.) I've been thinking about you and your little one. I bet she's grown so much since I last saw you. Hard to believe isn't it? I'm calling because I'd love to meet with you over coffee one morning next week when the kids are in preschool. This may or may not be of interest to you but knowing what a great mom you are, I thought you might be interested in some products I found that are making a difference for me and \_\_\_\_\_ (child's name). And there's even more to it. Should be a quick half hour and we can enjoy some quiet time. Can I count on you? Does next Wednesday at 9:00 a.m. work for you?***”**

#### Grand Opening—leading with products

**“**Hi \_\_\_\_\_. *I have to tell you how excited I am. I have been using Shaklee products to (improve my health, lose weight, reduce toxins in my home, whatever applies to you or your prospect) and can't believe the difference I am seeing! I'm so impressed with Shaklee products that I've decided to open my own business and would LOVE to get your opinion of these products. I am planning my Grand Opening on \_\_\_\_\_. You've always been there for me, so I know I can count on your support. It should be a lot of fun, and there'll be people coming that you may know. No obligation, just a chance to learn about this company that's really making a difference. Feel free to invite someone. Can I count on you to come and bring a friend?***”**





### Friendly business approach with contacts you know

#### For a Grand Opening Event—family member or friend:

*“Hi, Peter, I’m so excited. I’ve decided to launch my Shaklee business and I’m just learning how to do it. My business coach is coming over to give the presentation and I’m going to watch. I just need an audience! I would really love it if you would come to support me. It’ll give you an insight in what I am doing and you might even find it interesting for you or someone you know. I’ve got two dates planned. (Give dates.) Which one works for you?”*

#### For a group event

*“Hi, Mary! (Brief, natural chit chat.) The reason I’m calling is to tell you that I’ve recently started a Shaklee business. I’m so excited because it has the potential to allow me to replace the income from my job and stay home with my family (or whatever your story is). I was thinking about our conversation last week about your concern for your job and how you’re exploring other options. I’m having an event at my home next Tuesday at 6:30 p.m. and I’d love to get a chance to introduce you to Shaklee. I’m also going to be talking about the products that have really worked for my family and how I am transitioning to Shaklee and building my income. Are you open to coming? It’s going to be a lot of fun.”*

#### For a 1-on-1

Same as above, but instead of saying, *“I’m having an event,”* say, *“I would love to meet with you over coffee or tea (or at the park, or for lunch), so I can introduce you to Shaklee and give you some great information about \_\_\_\_\_. In fact, I’d like the chance to share a little about our company’s history, philosophy, the wonderful products and the way we do business. Does next Wednesday at noon work for you?”*

### Direct business approach

#### For a contact you know well

*“Jim, I was thinking about you today. I’d like to grab a coffee together and share a business idea with you. I’ve always respected you for \_\_\_\_\_ and I just partnered up with some amazing people and an amazing company. I don’t know if it would be a fit for you, but I’d like to share it with you. Can we get 30 minutes together on Thursday or Friday?”*

#### (They will ask, “What is it?”)

*“The company is the number one natural nutrition company in the U.S., and it’s called Shaklee. It has a relatively new owner that has launched a program that allows people to drive cars, travel, and potentially earn a six-figure income. Jim, I’m excited to get into the details. If you don’t see a fit for you, that’s OK—perhaps you could point me in the direction of someone who may be open to it. Sound good? (Book the time, place, and day, or book an online presentation.)”*

*People today  
are searching for  
an opportunity  
to change  
their lives.*





*It's all about what they WANT in their life, not what they NEED.*

## Step 4: INVITE

### ■ Questions approach

The two approaches below can be used very effectively with people you meet and don't know—and, with modifications, with people you do know. Here you focus on what you are going to ASK. **It works best as a conversation and is not as direct as the earlier approaches.** It allows you to get to know your prospect so you can decide how best to invite them. Remember: It really doesn't matter whether they need what you have to offer—if they don't want it, it makes no difference to them how valuable you think it is.

#### ● Conversational, friendly approach

This is called the “**FORM**” method of asking questions and is a relaxed way to find out about your prospect's needs in a conversation:

- F** for **family**: Do you have children? How old are they? Are you concerned about the health of your family? What do you do about it today? Are your children no longer living at home? (Are they empty-nesters?)
- O** for **occupation**: What do you do? How do you like it? How long have you been doing it? (Concerns often come up about instability of the future.) Is it your ideal career or are you looking for something different?
- R** for **recreation**: What do you do in spare time? Do you have any fun vacations planned this year? What motivates you?
- M** for **money**: This is a sensitive topic to raise, so as you get responses to earlier questions, listen for needs that relate to money. Lots of things come up in conversation like their car has just broken down, they are tired of putting their kids in day care, they are concerned about their investment portfolio, etc. In other words, listen for needs that would be solved if they had more money. *“You mentioned (monetary issue). I'd love to show you what I do. It might be something to think about and may be of help to you.”* (Set time and place.)

If they appear a good prospect for the products, you can invite them to one of your product events, knowing you will open the door to the entire Shaklee story at that time.

#### ● Direct business approach

This is called the “**SEVEN QUESTION**” direct approach that emphasizes **occupation** and allows you to find out where they are right now in their life or their job, what they like or don't like about it, where they would like to be in five to 10 years, and what they are doing to get there.

**What do you do?** This is a common question and breaks the ice. If you already know, skip the question.





**How long have you been doing it?** If they say anything over three years, say something like: *“Wow, you must really love what you do!”* How they respond will tell you a lot about where they are coming from.

**What do you like about it?** This is important to learn so you know how to tailor your segue to the opportunity so it will appeal to their specific interests.

**Are there things you don't like about it? Any downsides?** This allows you to find out what they don't like so when you refer to the opportunity later you can address how it solves their concerns.

**What would you like to be doing five to 10 years from now?** If they have a definite idea, you know they are a goal-oriented individual. Many times you are likely to hear: “I don't know, but it is sure not this!”

**What are you doing to make it happen?** This tells you how serious they are. If they have a plan and are doing something about it, they are self-motivated and could be a good candidate for Shaklee. If they don't have a plan, either they have not found the right vehicle or they are not serious about change in their life. By this time, they have shared great information with you and you'll have a very good idea whether this person is a good prospect. Based on what you learn, you can decide how you want to proceed.

**AFTER you use either of the question approaches, if they appear a prospect for the opportunity, you can ask:**

*“Are you open to new opportunities?” OR “Are you looking for ways to create additional streams of income?”* If they say ‘no,’ move on, but be sure to leave them your contact information in case they change their mind. If they say ‘yes,’ invite them to hear about Shaklee:

*“I'd like to sit down over a cup of coffee and share with you what I am doing. You may find out that you can (say what they wanted) without (say what they didn't want or like). Will Tuesday at noon work for you? Just so you know, ‘no’ is an OK answer, and it won't affect our relationship.”*

The point is this: Until they say they are open to looking at other options or opportunities, don't make an approach to invite them. Nobody shoots you down or gets defensive. You don't have to be defensive because you know you won't ask until you're sure they are ready to say YES.

Just be sure you keep it conversational. Respond, give them feedback, and build a bridge between you. You will discover that the rapport builds very quickly and easily and is a lot of fun because you know where the conversation is going to end up. Most likely, they will be willing to set up an appointment.

*Relax.*

*Have fun.*

*Keep it conversational.*





*Always ask for permission to introduce your prospect to Shaklee.*



## Step 4: INVITE



### Set Expectations That You Will Cover the Whole Shaklee Story

Regardless of whether your approach is product- or business-based, always ASK FOR PERMISSION to introduce your prospect to Shaklee by giving them an overview of who we are.

#### ■ If you are talking with someone who has expressed an interest in being healthier:

**Prospect:** "I've got to get my act together and get my health and the health of my family in shape."

**Distributor:** *“Have you ever thought about a nutritional solution?”*

**Prospect:** "No."

**Distributor:** *“Would you be open to some information?”*

**Prospect:** "That sounds good."

**Distributor:** *“Great! Let’s set up a time to meet for coffee and I will share some options. Our family has really benefited from using Shaklee products. I know you’re looking for things you can do to increase your family’s health, so we’ll spend time talking about what might be the solution for you. **I’ll tell you more about Shaklee and the way we do business.**”*

#### ■ If you are inviting people to an event in which you want to feature Get Clean®:

*“Hi, Mary, I’d love to invite you to a presentation I am having in my home about Shaklee Get Clean products. They are earth-friendly household products that work SO great and without all the toxic chemicals. I really thought you might be open to learning about them **and all that Shaklee has to offer.** The date is Wednesday at 7 p.m. Will that work for you? (If not, give them the alternate date.) That’s OK. I am also doing it on Friday at 8 p.m. I’ll see you there!”*



## Use Third-Party Reference/Materials as a Resource

Always be ready to approach someone by remembering to use third-party references (tapes, books, a friend's experience) and by asking permission to share information:

*“I have a CD in my office on ‘Why Supplement.’ Would you be open to listening to it?”*

*“I was just talking with someone who had the same challenge. Would you like me to send you information on what helped her?”*

Many successful Business Leaders recommend sending the prospect some materials to review prior to meeting with them. It could be a simple e-mail confirming the date, time, and place, with a short video clip for them to review on the Shaklee Difference or something they might be interested in. Shaklee 180™ has excellent recommendations on what to do and what tools to use to market your Shaklee 180™ parties. Be sure to have your Shaklee Personal Web Site (PWS) activated when you begin inviting others to hear more about Shaklee, just in case people want more information before coming to your event.



## Other Great INVITE Ideas

Don't forget to watch the *INVITE* course in Shaklee University featuring Presidential Master Coordinator Shawn Gray. Shawn covers his approach to inviting family, friends, and acquaintances, and he also addresses how he handles questions. Well worth your time!

*“This right here is the engine of the vehicle  
that will allow you to achieve your dreams.”*

— Presidential Master Coordinator Shawn Gray



*Have your  
Personal Web  
Site up and  
running so  
people can  
check it out.*