

Getting Started Guide

Congratulations on joining the Shaklee Family and welcome to your New Distributor training. This training will help you learn the best practices of starting a Shaklee Wellness Business. Here you will find all the worksheets that are referenced in the Shaklee Share App—Getting Started Training. Use them while you follow along with our videos and prompts as you complete the welcome trainings.

From the reasons to love Shaklee to the Shaklee Vital Behaviors for success, these trainings will give you all the tools you need to set you up for success and help you build business momentum as you grow.

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Launch Your Business Checklist

Use this checklist to guide you through the Getting Started: Onboarding For Your Business training program.

Day 1

- Chat with your upline business partner
- Set Up Your Personal Website
- Set Up Your Direct Deposit
- Download Shaklee Connect® app on your smartphone
- Download Shaklee Share app on your smartphone
- Get to know the Shaklee Share app by completing the "Get to Know Shaklee Share" courses



To start the courses:

- Log in to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Get to Know Shaklee Share"



- Follow @ShakleeHQ on Facebook, Twitter, and Instagram
- Take the Meology™ assessment to get your personalized nutrition regimen (if you haven't already!)

Day 2

Start your Onboarding: Launch Your Business training program in the Shaklee Share app! Today, complete the Onboarding course "Launch Your Business" in the Shaklee Share app.

To start the course:

- Open the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Launch Your Business"

Lesson 1: Vital Behaviors

Action Items:

- Update your business goals in the Shaklee Connect app
- Download the Shaklee Vital Behaviors Tracker

Lesson 2: Friends and Family Event

Action Items:

- Set a date to host your Friends and Family Event
- Talk to your upline business partner about hosting your event
- Invite 3 people to attend your Friends and Family Event

Lesson 3: Earn While You Learn**Action Items:**

- Commit to earning Star Club in your first month
- Identify 5-10 people that you will approach about joining Shaklee with a \$150 order

 Lesson 4: Sharing Samples**Action Items:**

- Identify 5-10 people who would benefit from receiving a product sample from you
 - Share at least 1 Shaklee product sample through the Shaklee Share app
- Fill in your Shaklee Vital Behaviors Tracker for Day 2

Days 3-4

Continue your Onboarding: Launch Your Business training program with the Connect course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Connect"

 Lesson 1: Build Your List**Action Items:**

- Download our "Memory Jogger" tool and create your list of contacts
- Add your contacts to "contacts" in the Shaklee Connect app
- Identify your top 5 contacts to connect with first

 Lesson 2: Expanding Your Network with Qualified Leads**Action Items:**

- Add 3 new people to your network
- Sort your contacts according to whether you think they'd be most likely to start a Shaklee Business, become a Shaklee Member, or use Shaklee Products
- Download and use the "Qualifying Your Leads & Picking Your Dream Team" worksheet
- Identify 5-10 people who would be on your ideal dream team

 Lesson 3: Optimize Your Profile**Action Items:**

- Update your profile(s) with a consistent profile photo
- Update the "bio" or "about me" section of your profile(s)
- Engage in the comments on your latest post(s)

Lesson 4: Creating Curiosity**Action Items:**

- Select 3-5 topics you will post about regularly
- Work on posts for creating curiosity

 Lesson 5: Social Media Sharing Resources**Action Items:**

- Use the Shaklee sample social media calendar to plan posts for the next 1-2 weeks
- Share a post from the Shaklee Share app

 Fill in your Shaklee Vital Behaviors Tracker for Day 3 Fill in your Shaklee Vital Behaviors Tracker for Day 4**Days 5-6**

Continue your Onboarding: Launch Your Business training program with the Invite course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Invite"

 Lesson 1: Inviting with Confidence**Action Items:**

- Use the Inviting Formula to craft 3 custom invitations
- Invite 3 people to purchase Shaklee products
- Practice resolving concerns with our Resolving Concerns PDF guide

 Lesson 2: Pop-Up Planning Best Practices**Action Items:**

- Start thinking about a date to host your first Pop-Up

 Lesson 3: Product Pop-Up**Action Items:**

- Set a date to host your first Product Pop-Up
- Create personal invitations for your Product Pop-Up
- Invite 3 or more people to your Product Pop-Up

 Lesson 4: Lesson 4: Business Pop-Up**Action Items:**

- Set a date to host your first Business Pop-Up
- Create personal invitations for your Business Pop-Up
- Invite 3 or more people to your Business Pop-Up

- Fill in your Shaklee Vital Behaviors Tracker for Day 5
- Fill in your Shaklee Vital Behaviors Tracker for Day 6

● Day 7

- Your Shaklee products should have arrived! Reach out to your upline business partner or visit the Naturally blog to find info, recipes, and more about your new products.
- Continue your Onboarding: Launch Your Business training program with the Follow Up course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Follow Up"

Lesson 1: Getting Started with Shaklee Connect

Action Items:

- Update your Vital Behavior goals in the Shaklee Connect app
- Create 3 Follow Up tasks in the Shaklee Connect app
- Send a personal message to anyone who has purchased products from you or that you've sent a product sample to

Lesson 2: Follow Up Best Practices

Action Items:

- Reach out to follow up with 3 people
- Add your follow ups to the Shaklee Vital Behaviors Tracker
- Add follow up notes to the Shaklee Connect app

Lesson 3: New Member Guide

Action Items:

- Share the Shaklee Member Benefits flyer with a potential new Member
- Share the Shaklee Member Benefits flyer with a new Member
- Download and use the New Member Follow Up Tips PDF to guide the first 30 days of follow ups with your new members

- Fill in your Shaklee Vital Behaviors Tracker for Day 7

● Days 8-9

- Enjoy your new Shaklee products! Keep notes on how you're feeling and what you're experiencing as you use the products to help craft personalized stories to share.
- Practice what you learned in the courses about Invite, Connect, and Follow Up! Reach out to your upline business partner for support if needed.
- Fill in your Shaklee Vital Behaviors Tracker for Day 8
- Fill in your Shaklee Vital Behaviors Tracker for Day 9

Days 10-11

Continue your Onboarding: Launch Your Business training program with the Use & Love Shaklee course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Use & Love Shaklee"

Lesson 1: The Shaklee Product Offering

Action Items:

- Use your Shaklee nutrition products
- Identify 3 Shaklee solutions you can incorporate into your life
- Add 3 new products to your Loyalty Order

Lesson 2: Sharing Shaklee Stories

Action Items:

- Create a product story
- Create a business story
- Share one of your stories with others

Lesson 3: Join the Shaklee Community

Action Items:

- Join The Shaklee Effect Facebook group
- Add the Mission Possible Monday call (every Monday at 9 AM Pacific Time in The Shaklee Effect Facebook group) to your calendar each week
- Connect to your team's social media groups or calls
- Fill in your Shaklee Vital Behaviors Tracker for Day 10
- Fill in your Shaklee Vital Behaviors Tracker for Day 11

Day 12

Continue your Onboarding training program with the Invest in Personal Development course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding For Your Business" and then select "Invest in Personal Development"

Lesson 1: Invest in Personal Development**Action Items:**

- Add at least 10 minutes to your calendar each day for scheduled and committed personal development time
- Select the book, online course, podcast, etc., that you'll start your personal development with
- Commit to sharing something you've learned from your personal development next week with a friend, upline business partner, or spouse
- Fill in your Shaklee Vital Behaviors Tracker for Day 12

Days 13-14

Wrap up your Onboarding training program with the Building and Maintaining Momentum course in the Shaklee Share app.

To start the courses:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Onboarding: Launch Your Business" and then select "Building and Maintaining Momentum"

 Lesson 1: Building and Maintaining Momentum**Action Items:**

- Commit to building your business momentum with belief and consistency

 Lesson 2: Building Belief**Action Items:**

- Define your WHY
- Add or update your WHY in the Shaklee Connect app
- Share your WHY with your upline business partner

 Lesson 3: Creating Consistency**Action Items:**

- Set your business goal(s)
 - Identify the skills you need to accomplish your goal(s)
 - Create a daily action plan to build the skills you need
 - Save your goal(s) in the Shaklee Connect app
- Fill in your Shaklee Vital Behaviors Tracker for Day 13
 - Fill in your Shaklee Vital Behaviors Tracker for Day 14

● Day 15 and Beyond

Stay committed to achieving your goals and earning the Star Club and Loyalty Bonuses each month with these tips:

Daily:

- Connect, invite, and follow up with 3 people.
- Invest in personal development for 10+ minutes.
- Use and love Shaklee products.

Monthly:

- Host 3 pop-up events – two product-focused and one business-focused.
- Help 3 new people begin their journey with Shaklee with a \$150 order.


Ongoing:


- Help 3 new Distributors experience the benefits of the Shaklee Loyalty Rewards program with a \$150 monthly Loyalty Order. Then teach and train your new Distributors to do the same.


Shaklee Vital Behaviors Tracker


Name: _____


Week _____


 Connect


 Invite


 Follow Up


 Use & Love
 Shaklee


 Personal
 Development

Star Club _____

Loyalty Bonus _____

Shaklee Rewards Programs:

Goal for the month: Schedule & host 3 pop-ups

Connect	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Post social stories & posts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respond to comments & DMs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spend 10 minutes engaging on social media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start 3 conversations with new contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add 3 new people to your personal and social networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invite	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Invite 3+ people to your upcoming event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invite 3+ people to purchase the products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invite 3+ people to join you as a business partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Follow Up	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Follow up with 3 people about the business opportunity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow up with 3 customers about second order & loyalty rewards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow up with new members about maximizing their Shaklee membership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use & Love Shaklee	Sun	Mon	Tues	Wed	Thur	Fri	Sat
Daily Nutrition Regimen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Invest in Personal Development	Sun	Mon	Tues	Wed	Thur	Fri	Sat
10+ minutes of personal development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20+ minutes of exercise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Memory Jogger

Your List: The Lifeline to Build Your Business

Make a list of everyone you know. Use this tool to help you identify as many people as you can in your inner circle and beyond. Write down every single name that comes to mind. Don't pre-judge. This should be a fun process, so sit down and start writing! Don't overthink it.

Helpful Hint:

Everyone you have ever met is either a candidate for our product or the business opportunity, or they know someone who is.

Your **Action Plan** will be to **connect** with these individuals, **invite** them to learn more about our products and business & to **follow up** with them to help them reach a decision.

Do I know someone who(m)...

- Loves health or wellness
- Enjoys social media or has a large following
- I like being around
- Seems to win at everything they do
- Loves life
- Loves adventure
- Always gives 100%
- Has a strong belief in themselves
- Is not afraid to try new things
- Loves people
- Is a good communicator
- Has a strong sense of family
- Is smart but coachable
- Is active in church/ community
- I respect
- Shows concern for other people
- Others always seem to like
- Does personal counseling
- Is a professional
- Is active in clubs
- Is active in civic affairs
- Is in a teaching position
- Is looking for more out of life
- Is ambitious and "on the go"
- Is considered a leader
- Attracts leaders
- Has children just starting junior high, high school, or college
- Is looking for a financial safety net
- Wants more time with family
- Owns their own business

- Is under job-related stress
- Wants to have freedom
- Is considering a new profession
- Is looking for a job
- Is changing jobs
- Is unable to advance in their present job
- Is not fulfilling their talents
- Is not fulfilled
- Is an experienced salesperson
- Is entrepreneurial
- Is going to college, business, or trade school, etc., or has just graduated
- Was recently married
- Is divorced, "starting over"
- Knows everyone in town
- Exudes credibility
- Works with me now
- I see at the gym
- Is into sports, fitness, and health
- Is highly competitive
- Is an old friend
- Is health conscious
- Is concerned about their weight
- Has joint problems
- Has high cholesterol
- Needs greater energy
- Participates in a competitive sport
- Studies martial arts
- Is in a sales role
- Is resourceful
- Owns a beauty service
- Owns a wellness business
- Is a fitness coach
- Lives next door/across the street
- Is a hairdresser
- Teaches children at school
- Does door-to-door sales
- Is the finance director at school

- Was my spouse's college fraternity brother/sister
- Is my spouse's old high school teacher/principal
- Is my child's kindergarten teacher

My Relatives...

- Parents
- Grandparents
- Sisters
- Brothers
- Aunts
- Uncles
- Children
- Step-relations
- Cousins

Related Professions...



Teachers



Nurses



People working part-time



Remote workers



Fitness instructors & personal trainers



Nutritionists & dieticians

Ask for referrals and
Find leads

Third-Party Referrals:

Influencers &
Related Industry:

Online Marketing:

Lead Exchange:
(Exchange referrals with
health clubs, etc.)

Trade Shows:

There are multiple ways to build your list. Do what works best for you. Some people like making a list on their phone, while others have a planner where they build their list. Or you can print this document and start writing your list out right now.

ACTION PLAN

Connect (C), Invite (I), Follow up (F)

Name	Contact	Date	C	I	F	Referrals
1. John Doe	415-555-4555	9/12/20	✓			
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						

Networking Tips

Get beyond your warm market:

Ask for Referrals: _____

Recruit Influencers: _____

Ways you can connect in your community to create more opportunities:

Make a Difference: _____

Provide a Volunteer Service: _____

Join Organizations/Clubs of
Interest and Hobbies: _____

Keep your List with you and continue to add names to build your List

This way, your List never ends!

ACTION PLAN

Name	Contact	Date	C	I	F	Referrals
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						
21.						
22.						
23.						
24.						
25.						

Name	Contact	Date	C	I	F	Referrals
26.						
27.						
28.						
29.						
30.						
31.						
32.						
33.						
34.						
35.						
36.						
37.						
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41.						
42.						
43.						
44.						
45.						
46.						
47.						
48.						
49.						
50.						

Name	Contact	Date	C	I	F	Referrals
51.						
52.						
53.						
54.						
55.						
56.						
57.						
58.						
59.						
60.						
61.						
62.						
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71.						
72.						
73.						
74.						
75.						

Name	Contact	Date	C	I	F	Referrals
76.						
77.						
78.						
79.						
80.						
81.						
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100.						

Identifying Qualified Leads & Picking Your Dream Team

Looking for the right people to join you as customers/business partners will really help you grow your business and create a community you enjoy being a part of. Does it seem kind of crazy to care about the type of customers you bring on?

Well, your customers and members will be the first people you approach about becoming a business partner. They will also likely connect you to other referrals and will help you to build your network. The customers you bring on will become the business partners you have. If you could surround yourself with friends and acquaintances that you enjoy being around, why wouldn't you? The best way to start identifying qualified leads is looking at your list!

Values

Identify several values that are important to you in yourself and your team.

Behaviors

Think about what behaviors you admire in others or are proud you've developed.

Skills

What skills will be most valuable to have on your team?

Now you are ready to pick out your dream team! Look at your list and identify the people who have the values, behaviors, and skills you are looking for!

Name:

Why Them:

Month One Calendar

		Day One	Day Two	Day Three	Day Four	Day Five	Day Six	Day Seven
Week One	Post		Personal Post		Re-Introduce Yourself to Your Community		Personal Post	
	Stories	Start posting you with the Products	Tease that you have some exciting news coming next week! Ask your audiences to guess what it is	Share Stories		Share screen grabs, photos, feedback from your exclusive Friend and Family Event	Curiosity Story from the Share App	
Week Two	Post	Share something you learned from your personal development study			Personal Post			What almost stopped you from starting your business
	Stories	Quote from your personal development		Curiosity Story from the Share App	Why you started your business		Behind the scenes of your workday	
Week Three	Post		How working on your business is making you a better person			Personal Post		Share your personal product story
	Stories		Something you love about your side business			Something you learned in personal development		What you love about your team and the Shaklee Community
Week Four	Post	Personal Post		Share your "Why"	Personal Post		What your first big business goal is	
	Stories	Motivational Quote		Ask your audience if they have a "Why" or mission statement & to share it with you		Curiosity Story from the Share App		

Your Feed Posts

Your Instagram Feed is the magazine version of your life. These posts are the polished version of what is happening in your day-to-day. This content can be planned ahead of time and curated to tell the story you want to tell. Your audience will expect that these photos are high-quality, edited to be consistent, and aspirational.

Personal Posts

In the training you were prompted to pick several topics that you felt comfortable talking about and sharing. People follow you because of your unique life and what you have to offer; you want to keep that a regular part of your feed. Share regularly from the 5-7 topics that you decided were core to your personal brand. Rotate through the topics so that they each get covered monthly and your audience knows who you are and what you have to offer.

Social Media Stories

Social media stories are awesome because their lifespan is so much shorter. People love watching stories to get a glimpse of what it's like to live your everyday life and get a behind-the-scenes view of what's happening. They expect this content to be a lot rawer and less edited. Remember to continue to share the pieces of your life you were already sharing. Here are some ideas of stories you can post every day:

Personal Story Ideas

1. Your daily routine
2. How you spend your day
3. What you are cooking/eating/drinking
4. How you manage your household
5. Hobbies and talents that you have
6. Time spent with family and friends
7. Any kind of a routine:
 - Skin Care
 - Workout
 - Nutrition
 - Food Prep

Shaklee Story Ideas

1. You using, experiencing, or trying the products
2. Your time spent in personal development
3. Any kind of a routine:
 - Skin Care
 - Workout
 - Nutrition
4. How you fit your business in around your life
5. Business meetings/lunches/team calls
6. Shoutouts to new business partners
7. Behind the scenes of your pop-up events
8. Invitations for samples or upcoming events

Business Posts

These prompts will help you talk about your business in a way that feels natural and without Shaklee being all over your feed. We know you are excited to share about Shaklee, your new business, and how people can join you. Remember that creating curiosity is part of the process and key to not alienating your existing audience.



You + Story + Invite

You

+

You've always encouraged me to dream big.

Story

+

I took your advice and decided to invest in myself! I started a new wellness business that is going to allow me to stay home with the kids and still contribute to my family economy.

Invite

What do you think about being one of the first people I share my new business with?

You

+

You are always finding new products and are on top of all the latest trends.

Story

+

I followed your lead and started looking for more customized and personal solutions for my nutrition. I found an amazing new product line that allows me to completely customize my supplements based on exactly what I need.

Invite

What are your thoughts on taking the assessment and looking at the products with me?

You

+

You are always looking for plant-based options for you and your family...

Story

+

...so I started incorporating more plant based options into my life. I found this amazing product that has really simplified my meals and gives me the confidence to help my entire family eat well.

Invite

What do you think of being one of the first people I share a sample with?

Build Your Own

Now that you have the formula in action, spend some time thinking about the people you want to invite to your Friends and Family Event. Use the formula to craft personal invitations to your event.

NAME	YOU +	STORY +	INVITE
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____
_____	_____ _____ _____	_____ _____ _____	_____ _____ _____

Navigating Common Concerns

Common Concern	Understand & Relate	Find Out More	Provide More Information	Guide to a Decision
"I've seen some negative reviews about Shaklee."	"That is actually not surprising. Every brand that is disruptive or making waves has its detractors."	"Have you seen the results of the Landmark Health Study?" "What questions do you have about what you read/heard?"	"Dr. Shaklee developed the first multivitamin in the US in 1915, and we've been innovating ever since. Shaklee is proven by science with 71 patents and patents pending and over 120 published scientific journal articles. Our products are also proven by people!"	"Is there anything else you would like to know, or would you rather experience the products for yourself?"
"I don't think I can spend the money right now." (on a new business)	"I hear you. I was in a similar situation when I first started thinking about the business. I decided to cut out my morning coffee stop routine to make room in the budget for it."	"If money were not an issue, is this something you think you would like to do?"	"One of the great things about starting a Shaklee Business is that there are no major up-front investments or inventory requirements."	"If I could show you how to earn your investment back through product sales, would you want to give it a try?"
"I want to think about it."	"I totally get that. I needed to take a day or two to think about all the information I received too. It's natural to feel a little cautious when you haven't experienced the fun of the Shaklee Community or the profit yet."	"Aside from the things we've talked about, is there any other information you might need to know as you're thinking about it?"	"Here's something to think about... Every Shaklee Product is 100% Guaranteed. We believe in the safety and proven performance of all of our products. If you're not satisfied with any of our products, you can send them back to us for a full refund, even if the container is empty. That's The Shaklee Difference®."	"When is a good time to connect on _____ to see if any other questions have come up?"
"I need to talk to [John/Jane] about it..."	"I totally get that. I wanted to discuss with my significant other as well..."	"What questions do you think [John/Jane] might have that I can help answer?"	"We've been in business for 64 years! We stand behind our business and all of our products are 100% Guaranteed—If not satisfied, you can return them even if the container is empty."	"When is a good time to connect on _____ to see if any other questions have come up?"

Common Concern	Understand & Relate	Find Out More	Provide More Information	Guide to a Decision
<p>"I don't know enough people."</p>	<p>"Believe it or not, I thought that too. The funny thing is that most of my customers are not even from my friends & family circle."</p>	<p>"Can you think of that one person in your network who seems to know everybody? You could start with them!"</p>	<p>"Customers who love their experience give me referrals all the time! And it started with just one person who knew one person...and grew from there. In fact, we even have a VIP referral program that rewards them for giving those referrals."</p>	<p>"If I could show you how to get started with just a few customers and then how to grow through referrals, would you be willing to give it a try?"</p>
<p>"I am not a salesperson."</p>	<p>"That's good because nobody likes to be 'sold' to, but we all like to buy things!</p> <p>The funny thing is that we share recommendations with our friends and family all the time. It might be a restaurant, babysitter, favorite gym.... Making a protein or supplement recommendation based on a great experience is no different than recommending your new favorite restaurant."</p>	<p>"What is the last purchase or experience that you really loved and talked about with your network of friends?"</p> <p>"Were they interested in what you had to share with them?"</p> <p>"How did it feel to know that you helped your friends and the business you recommended?"</p>	<p>"Influencers on social media make recommendations all the time. And research has shown that people are more likely to try a new product or service based on someone else's positive experience. That positive experience might as well be you!"</p>	<p>"Does this seem like something you could see yourself doing?"</p>
<p>"I am super-busy." or "I don't have time."</p>	<p>"That I understand—my life was packed when I first thought about starting a business."</p>	<p>"Are you not sure how much time a side business would take, or that you could do a good job in the time you have available?"</p>	<p>"My business partner and I looked at my calendar and figured out where I could spend just a few hours a week in the beginning. That was enough to fund my _____! (something small)</p> <p>As things took off, it was easier to prioritize my business."</p>	<p>"If I were to help you find a few hours each week to spend on your business, would you give it a try?"</p>

New Member Follow Up

Following up with your new Members is one of the most important types of follow up you'll do. Check out these great Follow Up tips to give your Members the best Shaklee experience:

Member Name: _____ Order Date: _____

Phone Number _____ Email Address _____

Preferred Contact Method Call Text Email

Products Ordered: _____

Wellness Goals: _____

Notes: _____

If your Member purchased Meology™, Meology™ Prove It Challenge™ (PIC), Prove It Challenge™ (PIC), and/or a new 7-Day Healthy Cleanse (Cleanse), they may also receive some emails from Shaklee. We've noted these for you throughout this document.

 PIC  Meology  Meology PIC  Cleanse



Thank you for your order!

Day 1: Meology, Meology PIC, PIC, and/or Cleanse: Welcome Email

Date: _____

Call Text Email

Follow up with your new Member to express your appreciation via text or a personal note, or even better, give them a call.

“ I was really excited to see that you just ordered [product]! I really appreciate your supporting my business with your purchase and I think you'll really notice a difference when you start using the product(s). ”

Get to know them and their needs or goals by listening. This will help you build an authentic relationship and suggest other products for them to try in the future.

“ What health goals are you hoping [product] will help you achieve? ”

Let them know you're available to support them. Make sure they know your contact information and that you're happy to help answer any questions they may have about the products or their Shaklee Membership.

“ This is my cell, so please feel free to reach out if you have any questions. ”

Follow Up Notes: _____



Your product(s) should arrive soon!

Date: _____

Call Text Email

Follow up with your Member to make sure they received the shipping notice for their order. It should be on its way to them and this action gives you another chance to provide great service.

“ I wanted to check in to make sure you’ve received the shipping notice for your order. Your products should be arriving soon. ”

If you haven't already, talk to them about their Member benefits and The Shaklee Difference® they can expect from their products. Share the Shaklee Member Benefits flyer with them after your Follow Up.

“ While you wait for your order to arrive, I wanted to share some info with you about your benefits as a Shaklee Member and about the quality standards you can expect from your Shaklee products. I'll send you the full details via email, but some of my favorite highlights are... ”

Follow Up Notes: _____



Your order has arrived!

Date: _____

Call Text Email

Follow up with your new Member to make sure their order has arrived and that they're satisfied with what they received.

“ I'm just checking in to make sure your order arrived okay. ”

Help them get started using their new product(s) and answer any questions they may have.

“ [Product(s)] is one of my favorites. I love to [your tip for using their product(s)]. Do you have any questions about getting started that I can help answer for you? ”

Follow Up Notes: _____

- Day 12:** Cleanse: Cleanse Prep Email Meology PIC/PIC: Cleanse Prep Email
- Meology Only: Personal Story Email



Refer a Friend for \$10 off.

Day 20: Cleanse: You Did It! Email Meology Only: Cross-Sell Email
 Meology PIC/PIC: You did it! Now, transition to Shakes Email

Date: _____

Call Text Email

Follow up to encourage your Member to share their Shaklee experience and get rewarded through the Member Referral program.

“ Are you still loving your [product(s)]? I wanted to remind you that you can get \$10 off your next order by referring a friend. All you have to do is share your Refer a Friend code, and when a friend purchases \$100 or more, they'll get \$10 off their order and you'll get \$10 off your order. ”

Make sure they can find their code and ask them to review their product(s) on Shaklee.com.

“ Let me know if you need help finding your Refer a Friend code. Also, I would love others to hear about your product experience. If you could leave a review on the product(s) at Shaklee.com, I know it could help others, maybe even the friends you refer. ”

Follow Up Notes: _____

Day 24: Cleanse: Love It Email Meology PIC/PIC: Cross-Sell Email

Day 25 Ready to reorder?

Date: _____

Call Text Email

Follow up to help your Member reorder and/or buy new products.

“ It’s been almost a month since your first order, and I don’t want you to run out, so I thought I’d check in to help you reorder. ”

Remind them about Loyalty Rewards, the convenience of getting a shipment automatically each month, and how to get started.

“ Don’t forget you can also set up an automatic monthly Loyalty Order. Your products are delivered to your door every month and you earn points for every order that you can redeem toward free product. ”

Tease a product from a category they haven’t tried yet to create curiosity. For example, if they’re ordering supplements, recommend a Home product.

“ I used my Loyalty Rewards points to try [product] for the first time and now it’s a must-have on my Loyalty Order every month. ”

Follow Up Notes: _____

Day 28: (+) Meology: Buy Again with Free Shipping Email

Day 30 And beyond:

Set Follow Up reminders in your Shaklee Connect® app to remind you to follow up with your Member at regular intervals. Here are some Follow Up ideas for you to consider:

- **How are you doing with achieving your health goals?**
Follow up with your Member to see how they are doing, check if they're still working toward the same goals or if they have new ones, and suggest new products for them to try.
- **Have you seen the products Shaklee offers to support your whole family?**
Follow up with your Member to introduce products for their children or other family members.
- **Have you shared your Refer a Friend code with anyone recently?**
Follow up with your Member to remind them about the benefits of sharing their product experience with others to get \$10 off their next order.
- **Have you heard about [product]?**
Follow up with your Member to tell them about a new product launch or your new favorite product.
- **Can I help you redeem your Loyalty Rewards points?**
Follow up with your Member to remind them about the Loyalty Rewards points they've racked up. Find out if they need suggestions on new products to try or if they're saving up points to buy something specific.
- **Would you like to learn more about earning money by sharing Shaklee?**
Follow up with your Member to see if they're interested in becoming a Shaklee Business Owner.
- **Have you seen this?**
Follow up with your Member to share a video or image from Shaklee social media that relates to them/their wellness goals to encourage engagement with the Shaklee Community.
- **Did you know?**
Follow up with your Member to share a compelling fact about a product they haven't tried yet.
Example: Did you know Shaklee Sustained Release Vita-C® is clinically proven to raise blood levels of vitamin C for up to 12 hours*?
***This statement has not been evaluated by the Food and Drug Administration. This product is not intended to diagnose, treat, cure, or prevent any disease.**
- **Ready to celebrate?**
Follow up with your Member to celebrate their loyalty when they hit Loyalty Order milestones like six or twelve consecutive months.
- **Can I share your story?**
Follow up with your Member to have them share a product testimonial that you can share with others.

Pro Tip:

Is your Member a pro at referring friends? You may want to talk to them about upgrading to a Distributor account!

Pro Tip:

Let us help with your Follow Up! If your Members follow @ShakleeHQ on social, they can see Shaklee during their daily scroll.

Sharing Shaklee Stories

Stories are an important part of creating curiosity and driving conversation around topics you care about. Just as you share stories about the funny thing that happened at the store or the big party you went to this weekend, sharing Shaklee stories will be an important part of your business.

We'll teach you a formula for creating and sharing your Shaklee Product stories and business success stories.

Product Stories:

The Problem:

What was happening in your life that you needed to change?

Aha Moment:

When you knew you needed to make a change

Shaklee Solution:

How did Shaklee help solve your problem?

Personal Experience:

How did you change, how do you feel now, and what is your personal testimonial?

Call to Action:

Invite others to learn more.

Shaklee Business Stories:

Life Before Shaklee:

What was happening in your life that made you feel you were ready for Shaklee?

How I was Introduced:

Share how you were introduced to Shaklee and the business-building side.

Before I Started:

What were you nervous about before you started?

Personal Experience:

How did you change, how do you feel now, and what is your personal testimonial?

Call to Action:

Invite others to learn more.

My Why

Create Your Mission Statement

Think about what you want to have and do in your life & who you want to become.

Ask yourself the following questions and make a mental note of the first things that come to mind. Don't censor yourself!

Next, jot down some of those thoughts below:

What motivates me?

What does my family need or want?

What would I change—is there something I'd like to eliminate?

What would I do if time and money were not an issue?

Who inspires me? (Identify a role model)

What do I want to have or have more of in my life?

(It could be anything from free time, flexibility, or financial security)

How would having these things impact my life and the life of my family?

What is something I would like to DO? Maybe it's for the first time ever, more regularly, or differently?

How do I view myself now? What changes would I like to make?
Who would I like to become?

Purpose and Passion Lead to Your Why

Connecting with your purpose is a proven approach to determine your **why**.
Answering the following questions will lead to your **why**.

What is the legacy I would like to leave behind?

What is my purpose?

What impact would I like to have?

What is my passion?

How would I like to make a difference?

Who am I?

When things get hard or I question my ability to do this, I will remember my **why**:

Goal Setting Example

What is the first goal you had when starting your business?

My Goal

Save \$500 for vacation

Accomplish by: 90 days

What are the skills you will need to accomplish this goal?

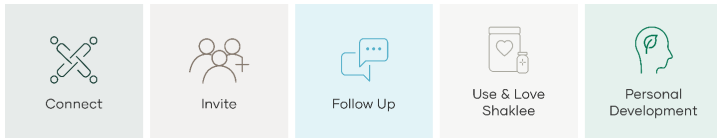
Skills I Need to Develop

1. Confidence presenting & selling the products

2. Hosting pop-up events

3. Training new business partners

What daily actions will build these skills?



Daily Action Plan

Use the products every day & share my experiences in my social stories

Create personal product stories for the products that I love talking about

Learn about the product benefits and key ingredients for the products I love

Invite 3+ people a day to purchase the products, attend a pop-up, or purchase a sample

Schedule monthly pop-up

Create personal invites to pop-ups

Invite 1 person a day to events

Go through the list builder activity

Identify 5-10 members of my dream team

Reach out to one person on my dream team a week

Work with upline on business pop-up