

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 the Shaklee Connect™ app on your smartphone
- Download the 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®

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 Behaviours

Action items:

- Update your business goals in the Shaklee Connect app
- Download the Shaklee Vital Behaviours 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 to 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 one Shaklee product sample through the Shaklee Share app
- Fill in your Shaklee Vital Behaviours 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 course:

- Open the Shaklee Share app on your phone
- Select “Learn” at the bottom of the screen
- Select “Getting Started: Onboarding for Your Business,” 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 Shaklee Members, or use Shaklee products
- Download and use the “Qualifying Your Leads and 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'll 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 Behaviours Tracker for Day 3
- Fill in your Shaklee Vital Behaviours 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 course:

- Open to the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Getting Started: Onboarding for Your Business," 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
- Practise 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: 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 Behaviours Tracker for Day 5
- Fill in your Shaklee Vital Behaviours 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 course:

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

Lesson 1: Getting Started With Shaklee Connect

Action items:

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

Lesson 2: Follow Up Best Practices

Action items:

- Reach out to follow up with 3 people
- Add your follow-ups to the Shaklee Vital Behaviours 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 Behaviours 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.
- Practise 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 Behaviours Tracker for Day 8
- Fill in your Shaklee Vital Behaviours Tracker for Day 9

Days 10–11

Continue your “Onboarding: Launch Your Business” training program with the Use and Love Shaklee course 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,” then select “Use and 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 noon Eastern 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 Behaviours Tracker for Day 10
 - Fill in your Shaklee Vital Behaviours 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 course:

- Open the Shaklee Share app on your phone
- Select “Learn” at the bottom of the screen
- Select “Getting Started: Onboarding For Your Business,” 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 Behaviours 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 course:

- Open the Shaklee Share app on your phone
- Select "Learn" at the bottom of the screen
- Select "Onboarding: Launch Your Business," 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 Behaviours Tracker for Day 13

- Fill in your Shaklee Vital Behaviours 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 events and one business-focused event
- Help 3 new people begin their journeys 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