

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: _____ E-mail Address: _____

Preferred Contact Method: Call Text E-mail

Products Ordered: _____

Wellness Goals: _____

Notes: _____

If your new Member purchased a Prove It Challenge™ Kit (PIC), he or she may also receive some e-mails from Shaklee. We've noted this for you throughout this document.





Thank you for your order!

Day 1: Welcome E-mail

Date: _____

Call Text E-mail

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

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

Get to know your new Member and his or her needs or goals by listening. This will help you build an authentic relationship and suggest other products for your new Member to try in the future.

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

Let your new Member know you're available to provide support. Make sure he or she knows your contact information and that you're happy to help answer any questions about the products or his or her Shaklee Membership.

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

Follow-up notes: _____



Your product(s) should arrive soon!

Date: _____

Call Text E-mail

Follow up with your new Member to make sure he or she received the shipping notice for his or her order. It should be on its way, 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 your new Member about Member benefits and the Shaklee Difference™ that can be expected from the products. Share the Shaklee Member Benefits flyer with your new Member 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 e-mail, but some of my favourite highlights are... ”

Follow-up notes: _____



Your order has arrived!

Date: _____

Call Text E-mail

Follow up with your new Member to make sure the order has arrived and that he or she is satisfied with what was received.

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

Help your new Member get started using the new product(s) and answer any questions he or she may have.

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

Follow-up notes: _____

Day 12:  **Cleanse Prep E-mail**

Day 15 How do you like it?

Day 15: Tips E-mail

Date: _____

Call Text E-mail

Share one of your favourite tips for using the product(s) your new Member ordered, or a recipe to support his or her health goals.

“ I saw this recipe online and thought you might like to try it. It looks so yummy and was labelled as [heart-healthy, hypoglycemic, high-protein, etc. – whatever matches your new Member’s health goal(s)]. ”

Get your new Member involved with the Shaklee Community.

“ You can find tons of healthy recipes on the Naturally blog at ca.shaklee.com. And, if you’re on social media, you can follow Shaklee at @ShakleeHQ to see posted recipes and other great info. I’ve connected with and learned from many people there with goals like mine. ”

Find out how your new Member is enjoying the product(s) he or she ordered.

“ Have you started taking your [product(s)] yet? How do you like it (them)? ”

Follow-up notes: _____

Day 24: Cross-Sell E-mail



Refer a friend for \$10 off!

Day 20: You did it! Now, transition to Shakes E-mail

Date: _____

Call Text E-mail

Follow up to encourage your new Member to share his or her 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 to Shaklee. All you have to do is share your Refer a Friend code, and when a friend purchases \$100 or more, that person will get \$10 off his or her order and you'll get \$10 off your order. ”

Make sure your new Member can find the code and ask him or her to review his or her product(s) on ca.shaklee.com.

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

Follow-up notes: _____

Day 25 Ready to reorder?

Date: _____

Call Text E-mail

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

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

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

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

To create curiosity, tease a product from a category your new Member hasn’t tried yet. For example, if he or she is 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: _____



And beyond:

Set follow-up reminders in your Shaklee Connect™ app to remind you to follow up with your new 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 new Member to see how he or she is doing, check if he or she is still working toward the same goals or if there are new ones, and suggest new products to try.
- **Have you seen the products Shaklee offers to support your whole family?**
Follow up with your new Member to introduce products for his or her children or other family members.
- **Have you shared your Refer a Friend code with anyone recently?**
Follow up with your new Member to remind him or her about the benefits of sharing a personal product experience with others to get \$10 off his or her next order.
- **Have you heard about [product]?**
Follow up with your new Member about a new product launch or what your new favourite product is.
- **Can I help you redeem your Loyalty Rewards points?**
Follow up with your new Member to remind him or her about the Loyalty Rewards points he or she has racked up. Find out if your new Member needs suggestions on new products to try or if he or she is saving up points to buy something specific.
- **Would you like to learn more about earning money by sharing Shaklee?**
Follow up with your new Member to see if there's any interest 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 him or her – or to his or her wellness goals – to encourage engagement with the Shaklee Community.
- **Did you know...?**
Follow up with your new Member to share a compelling fact about a product he or she hasn't tried yet.
Example: Did you know that Shaklee Vita-C 500 Sustained Release delivers the vitamin C equivalent of 1.5 oranges every hour for five hours?
- **Ready to celebrate?**
Follow up with your new Member to celebrate his or her loyalty when Loyalty Order milestones like six or 12 consecutive months are hit.
- **May I share your story?**
Follow up with your new Member to share a product testimonial that you can share with others.

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