

# 8 Weeks To Director

## Shaklee Business Training 2018

# Servicing Our Customers

Week # 6  
October 16, 2018



# Training Team for Week 6



Master Coordinator  
Barb Lagoni



Senior Executive  
Coordinator Pam Cary



Senior Coordinator  
Francine Roling



## Objectives for Session # 6 – Servicing Customers

- To understand the role of the business leader in servicing customers... and the importance of creating a customer service PROCESS.
- To learn how to incorporate New Member Orientations/ Member Update appointments into our Customer Service System:
- How to introduce new members to additional Shaklee products.
- To review incentives to offer members for hosting events, referring friends and attending webinars, conference calls and other Shaklee events
- To review ideas for introducing business information to members.. barb

- Consumer Value Proposition –
- exceptional customer service and experience

We bring value to our customers many ways...

#1: The consumer gets the **Shaklee difference in products**

- Shaklee's obsession with purity and potency
- Ingredient suppliers are scrutinized—those few who meet Shaklee's rigorous standards.. then use that in promoting themselves to other companies....it is THE gold standard in the industry to be a Shaklee supplier.

#2 in our way of doing business

- The consumer gets personalized attention,
- customized nutrition programs and
- real live human who cares about their needs. barb

## In a World of High Tech... Need for High Touch

- Technology is increasing in every aspect of our lives

The challenge is how to use technology to better service our customers... with the goal of bringing the human factor to an increasingly tech world..

- CAUTION – that we not use technology to avoid direct contact with others.
  - Shaklee Connect Mobile App – It is important to use it and embrace it. It will continue to evolve and expand.
- “ Definition of illiterate—People who are unable to learn, unlearn, and relearn..”  
The Third Wave Alvin Toffler barb

The Goal – integrating BOTH – technology with human factor

# Honor technology, but keep people at the center.

Roger Barnett

Shaklee's Objective .. To use technology  
NOT to replace people..  
But to EMPOWER them.



In our business ..  
Success is ALL about  
customer relationship and  
customer friendships  
That's what leads to orders, referrals, and  
business partners

People do business with people  
they know ...And like...And trust.



# Customer Service Tips

1. First impressions should be special  
We are Shaklee to everyone we meet... we want to represent it well with our health and our friendliness and our kindness.
2. ..and so should every other time be special, too.
3. Show a little TLC .. People feel beat up, lonely, criticized and tired..  
When they come to us, we lift them up and brighten their days.
4. Give people 100% of your attention. Be Present  
-- If you aren't taking care of them.. Someone else will. francine

## Tips Continued

5. Send thank you notes .. Respond to “ alerts” on Shaklee Connect Mobile App
6. Excel at communication and conversation .. Comes with practice.
7. Educate, recommend and support
8. Acknowledge and Appreciate customers, distributors and business leaders.  
The more we touch them .. The more loyal they will be.  
87% of consumers want to know if the company they do business with  
has a social conscience.  
Make our mantra .. “ gratitude always”. francine

## It's Our Job

People become Shaklee members for 3 reasons:

- To purchase Shaklee products at a member discount
- To have access to our health resources, guidance and special promotions and to us ... a caring advocate.
- To receive GREAT SERVICE.

- It is our job **to teach** new members about each remarkable Shaklee **product** and how it makes their life healthier.. And
- To create ways for them **to earn additional discounts by sharing with others.**
- And **benefits of a Shaklee business.**

francine

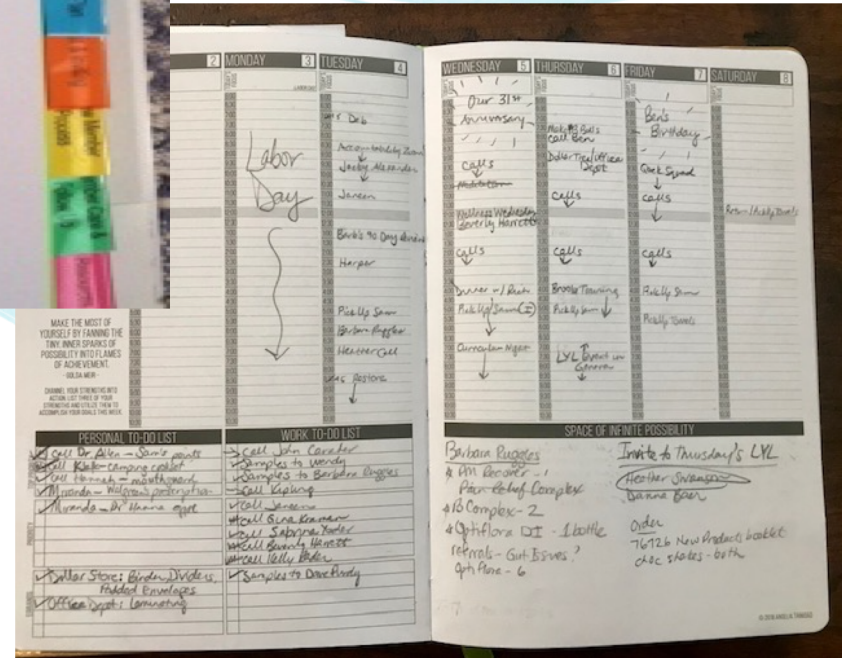
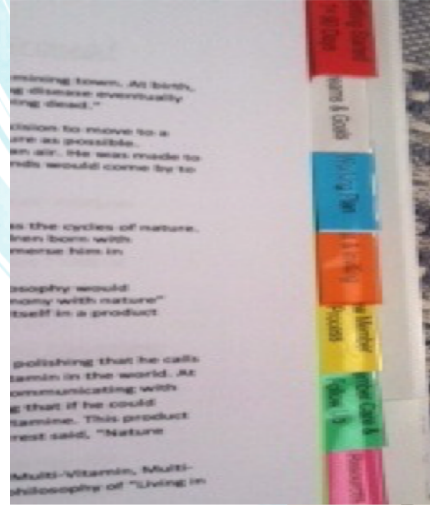


# Create a System for Servicing and Customer Care

- 3 ring binder
- Alphabetical divider
- Create one for every new customer. Insert in alphabetical divider.

Make notes with every contact you make with them

- Your welcome email and other materials ( see Addendum ) pam



## Set up a 3-ring working binder, day planner or MyShaklee.com Shaklee Connect

- Include a calendar with events to which you are inviting people.
- Your goals – keep our 90 Day goal ... and goals for current month in front of us every day
- Use Shaklee Connect app for follow up

pam

### Follow Ups

+ ADD

Oct 15, 2018 (1)

CREATED 09/18/2018



#### Opportunity Interest

Earning products for free.

**ANN RAMBASEK**



[VIEW ALL](#)

### Next Best Actions

ALL (127)



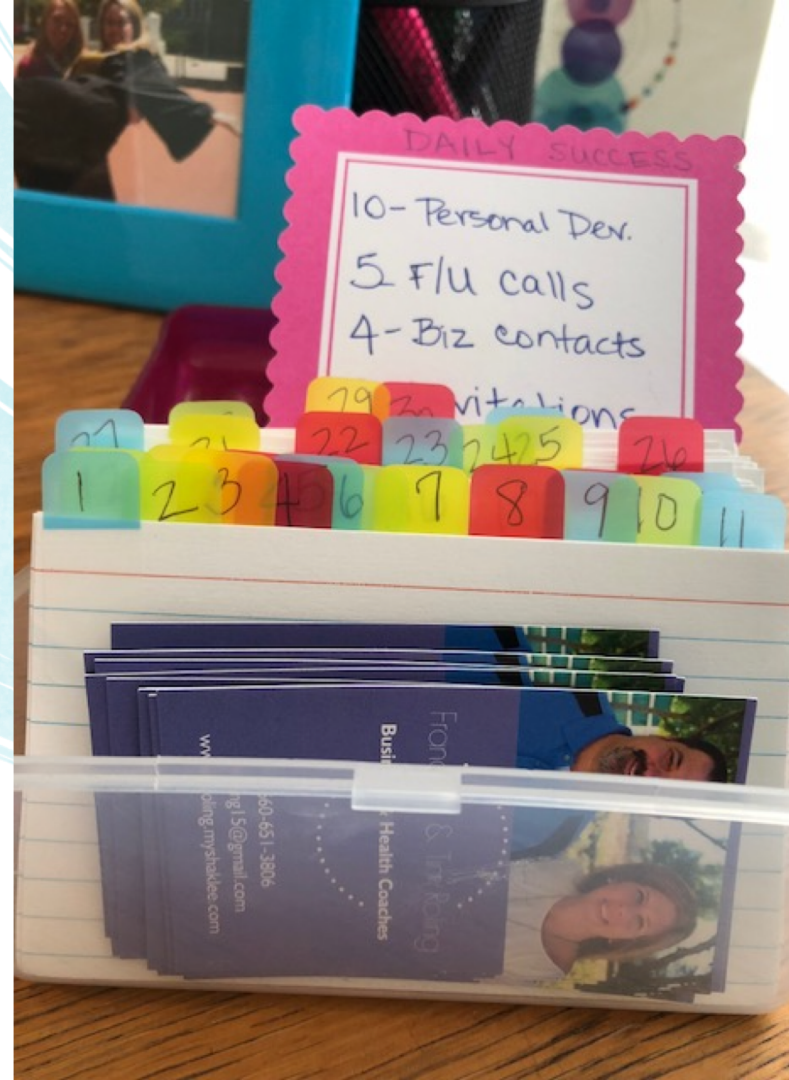
#### RECOGNITION

Congratulations on your new Shaklee Family Member, **KRIS BOROS** ! Welcome them and offer to support them on the path to living younger longer. [Click to email](#)  
11 days ago



# Tickler File

francine



# Offer Education on Wellness & Shaklee Products

- We want our customers to see us as a resource on wellness
- Offer Health chats & events:
  - Women's Health, Children's Health, Natural Medicine Cabinet , Healthy Home, Healthy You, YOUTH Look Younger Longer, Live Younger Longer , etc
- Learn and Earn – BetterHealthin31Days.com/\_\_\_\_\_ your name ... download report form. Offer \$10 off next order for listening to 3 programs.
- Healthprint – guide customer to best offer with free product, free shipping and free membership with \$150 choice. francine
-



# More Customer Wellness Education

- Create customer FaceBook group or plug into upline's group
- Post general health information .. Not just Shaklee products
- see Week 2 Social Media Do's and Don't's
- Mail thank you note with product/ health information sheet ... example .. Products for Digestive Health, Immune Health, Back to School products,
- Offer gift for scheduling personal health consultation ( can use health assessment form )
- Personally deliver collection of products to try .. Cleaners, personal care and shakes sample with recipes.
- Create customer appreciation sales in December and July. francine



## Francine Samuel Roling

18 hrs · Add Topics

Do you love salad but it goes bad on you in a couple of days? Vegetables are loaded with fiber, vitamins, and minerals. We should have 6-8 servings a day, but who wants to spend money on something that is just going to waste before we eat it all?

Here are a couple of tips:

1. Instead of buying the pre-cut lettuces in the plastic containers, but full heads of a variety of lettuce. That is cheaper.
2. To prepare, tear the lettuce with your hands or use a ceramic knife. When a metal knife touches the lettuce, the oxidation process starts.
3. Use a salad spinner to get the lettuce really dry.
4. Store it in a container with a tight, air-proof lid. When you open the lid throughout the week, condensation will have accumulated on the inside of the lid. Wipe it down each time before resealing.
5. Organic Greens Booster is another way to get a serving of broccoli, kale and spinach without all the prep. Just toss a spoonful in your smoothie, oatmeal, on a salad, in a bowl of soup, etc.

AND ASK ME HOW YOU CAN GET A CONTAINER FOR FREE FROM NOW UNTIL OCTOBER 25TH!

**New Organic Greens Booster**  
GET GREEN & SAVE GREEN

ONE CUP OF RAW ORGANIC, NUTRIENT-RICH GREEN VEGETABLES IN EVERY SCOOP  
CONTAINS DEHYDRATED BROCCOLI, KALE AND SPINACH

ADD ONE SCOOP OR MORE TO YOUR FAVORITE LIFE-ENERGIZING SHAKE OR OTHER BEVERAGE AND TRY IT IN FOODS SUCH AS OATMEAL, ON A SALAD, IN A BOWL OF SOUP, ETC.

YOU'RE GOING TO LOVE IT!

\$1.00 (per 1 oz. container)  
\$2.30 (per 3 oz. container)

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# Offer Incentives for Referrals / Hosting Events Online or In- person

- \$10 shopping credit for each guest attending
- Free product for referring a new member ... ex Vita –D-3, Basic H pint, Germ Off Wipes, Eye Makeup Remover, consider product line new to them
- Sponsor guests and referrals under them.. And explain benefits.
- When they invite 5 to a Smoothie Workshop, they come free.
- Example – ask customer greatest health concern among their friends... then set up Health Chat on those topics ( digestion ,cancer prevention, etc) .

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# Learn and Earn Program

***You Can Earn Cash Rewards for Learning more about Shaklee!  
Listen to 10 Online Topics and get \$60 in Free Products! (or listen to 6 for \$30)***

For the online listening program, you can earn money while listening/learning about Shaklee. Some of these are audio only and others are audio and webinars. For listening and taking notes on 10 topics, you can earn \$60 of free Shaklee products! Short on time? Listen to 6 and earn \$30 of products! You may listen online or on a podcast app

Here are 3 topics to start you out then you can choose from other topics you would also enjoy.

***Why Choose Shaklee?***

<http://www.betterhealthin31days.com/roling/kecd/ShakleeSetsStandard>

***Women's Health: In a World of Delicious and Dangerous Foods -***

<http://www.betterhealthin31days.com/roling/kecd/WomensHealth>

***Inside the World of Shaklee***

<http://betterfuturestartstoday.net/roling>

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You will see lots of other topics on the Better Health in 31 Days site!



## Benefits of New Member/ Member Update Appointment:

- Build relationships
- Introduces customers to all of the Shaklee product lines & the Shaklee Difference .. And increases PGV.
- Helps create lifelong customers.
- Allows us to offer incentives for referrals and hosting events... which often leads to business partners.
- Introduces benefits of the business opportunity.    pam

## New Member/ Member Update Appointments

- Pam's story – set up Member Update Appointments and generated 1500 PV first month.
- Offered 10% additional discount for meeting with her to review new catalog.
- And offered \$10 off their order for every guest they brought to the meeting
- See addendum for word tracks and dialogues

pam

# New Member Welcome Letter

## Maximizing Your Shaklee Membership

Welcome to Shaklee!

Thank you for joining Shaklee and for being part of our mission of contributing to healthier lives and a healthier planet. I was raised on Shaklee products. They have really made a difference in my health and the health of my family.

This letter will help explain the discounts, programs and resources that are available to you. Understanding this information will help you get the most out of your membership.

I look forward to being a resource and advocate for you!

To your health,

~ Pam Cary



## *First, a little business...*

- **Activate your account:** To activate your lifetime membership, go to [www.myshaklee.com](http://www.myshaklee.com), enter your member ID# in the *Activate your Membership* box, choose a password and you are good to go! (Please let us know if you need your ID#). This makes on-line ordering simple and easy!
- **Options for Ordering:** You have three options for ordering products. First, you can order online at [www.myshaklee.com](http://www.myshaklee.com). (There are additional benefits for using the flexible Autoship option). Second, you can call 1-800-SHAKLEE (1-800-742-5533) to order by phone. Third, you can contact me to place your order for you!

## *Member Benefits...*

- **Membership Discounts:**
  - 15% discount on ALL Shaklee products.
  - Periodic promotions and discounts. (Usually monthly. Watch for them!)
- **Personal Nutrition Consultation:** Available for you, your family members and friends. Take our Healthprint survey or request a free, personal, nutrition consultation via phone.





## The Shaklee Difference

At Shaklee, we believe nature holds the answers to a long and healthy life. That's why we take extraordinary measures to bring you truly life-enhancing products, and to guarantee the quality, safety, and performance of every one of them.

- 100,000 quality tests per year
- Over \$250 million in R&D
- Over 100 scientific publications, 90 in peer-reviewed journals



**ALWAYS SAFE**  
**ALWAYS GREEN**  
**ALWAYS WORKS**

**Shaklee**  
Creating Healthier Lives

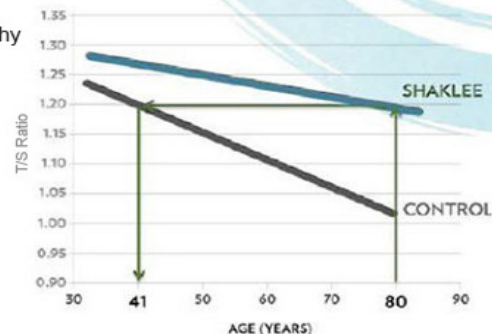
## The TELOMERE STUDY

The telomere study that compared people using Shaklee supplements for at least five years to healthy nonsmokers living in the San Francisco Bay Area

Shaklee users had significantly longer telomeres

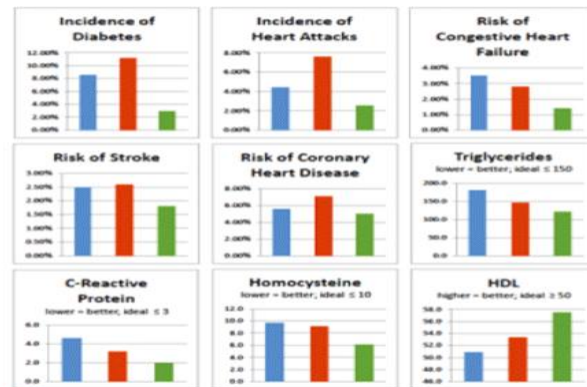
The rate of telomere shortening in Shaklee users was 40% lower than the healthy control group

A statistical analysis projects that an 80-year-old Shaklee user would have the same telomere length as a 41-year-old \*



\* Cross-Sectional Analysis of Telomere Length in People 33-80 Years of Age: Effects of Dietary Supplementation. Harley CB et al. (2014) 55th Annual Conference JACN, Vol. 33(5), p414

## The Research Behind The Development of Shaklee Vitalizer™



Legend:  
 ■ Users of no supplements  
 ■ Users of other brand of multivitamin  
 ■ Users of Shaklee supplements

Full study details available at [www.Clinical-Shaklee.com](http://www.Clinical-Shaklee.com)

**Shaklee**  
Creating Healthier Lives  
Independent Distributor

**Dr. Gladys Block**  
U.C. Berkeley  
School of Public  
Health



**CLINICAL RESEARCH  
BY INDEPENDENT  
THIRD PARTY  
PROVIDES THE PROOF**

- Conducted at UC Berkeley
- Published October 2007 in Nutrition Journal
- Compared those taking Shaklee to other brands or nothing at all.
- Most comprehensive study EVER conducted on nutritional supplements.

## Use, Share, Build

Because we have been so blessed by all the possibilities of Shaklee, we want to make sure you know the options available to you.

There are three ways to experience Shaklee:  
**Use, Share, and Build.**

You can **USE** by experiencing the way Shaklee products can help transform your health.

You can **SHARE** Shaklee products with friend and family through referrals. There are many ways to share.

- Learn with your friends to Earn:** Host a few...or a crowd...of friends in your home to learn about the Shaklee Difference and the range of ways Shaklee can address health goals and challenges. As the host you will receive free shipping on your next order and a discount on your products. (Contact me for more detailed information). You can also host a Shaklee Meeting on Facebook and receive great rewards as well!

- Share what you've learned with your friends:** We love the opportunity to be a resource and advocate for those you know and care about. Please feel free to pass on any information we send. There are product rewards when you send referrals because we so greatly appreciate the chance to serve them.

- Casual Distributorship:** You also have the opportunity to get a check back from Shaklee when you begin sharing with those you know. This casual option makes it easy to get your products paid for by Shaklee!

# Changing Brands to Safer Shaklee Equivalent

## LAUNDRY

- ☐ Concentrated Powder Detergent
- ☐ Liquid Detergent
- ☐ Laundry Pre-Spotter
- ☐ Delicate Fabric Soap
- ☐ All Fabric Bleach

Dryer Sheets  
☐ Fabric Softener

Fresh Laundry (powder)  
 Fresh Laundry (liquid)  
 Fresh Laundry (liquid) or H2  
 Fresh Laundry (liquid) or H2  
 Nature Bright  
 Soft Fabric Dryer Sheets  
 Soft Fabric Concentrate

## HOUSEHOLD CLEANERS

- All purpose Cleaner
- ☐ Window Cleaner

☐ Floor Cleaner  
☐ Chrome & Glass Cleaner  
☐ Tub & Tile Cleaner  
 Scouring Cleanser  
 Degreaser  
 Heavy Duty Cleaner  
☐ Toilet Bowl Cleaner  
☐ Disinfectant Cleaner  
☐ Dishwashing Liquid  
☐ Automatic Dishwasher Detergent  
 Disinfectant Wipes

Basic-H<sup>2</sup>

Basic-H<sup>2</sup>  
 Basic-H<sup>2</sup>  
 Basic-H<sup>2</sup>  
 Scour Off Heavy Duty Paste  
 Scour Off Heavy Duty Paste  
 Basic-H<sup>2</sup>  
 Basic-H<sup>2</sup>  
 Basic-G & Nature Bright  
 Basic-G  
 Dish Wash Concentrate

Auto Dish wash ☐  
 Germ Off Cleaning Wipes

Which Products Do  
 You Use Sheet

“As people begin to  
 understand the  
 Shaklee Difference  
 and find this is a  
 company they can  
 trust, they often  
 wonder, what else  
 does Shaklee make?”

## *Benefits of AutoShip....*

What is AutoShip? AutoShip is a service feature Shaklee offers so that you can continue with the regimen that meets your health needs on a regular basis with added savings as well!

- **Integrity:** The same integrity that Shaklee has in their products, they maintain in how they run their business. AutoShip is very easy to update and change so that it is convenient for you to benefit from.
- **Business Leader Access:** You can also choose to give me access to your AutoShip, so I can make those changes as a service to you, when needed.
- **Options:** Shaklee AutoShip offers you options. Each product in your AutoShip can be scheduled for every 30, 60 or 90 days. Use the Manage AutoShip option (see the drop down menu. “My Profile,” at the top of the home page) to manage clearly!
- **“Add one time” feature:** Allows you to add a product that you may not need on a regular basis.
- **“Skip” feature:** Allows you to move a product to your next AutoShip, when it lasts longer than anticipated.
- **Free Shipping:** Autoship orders of \$150 or more, receive free shipping.





You can **BUILD** a team in a way that works for you and fits your life...with the potential for *significant* financial rewards. I share this option with you because Shaklee has truly made a huge impact on my life, in ways that I never imagined.

I currently have one of the fastest growing teams in Shaklee. This opportunity is available to you, as well, or even someone you may know. If you are interested in exploring more, let's schedule a time to get together and talk about what joining my team might look like for you. The stability, integrity, community and wonderful products of Shaklee have created an amazing opportunity. Whether you are interested in a second stream of income or are at a place where you want to build something new, I would love to chat with you and share all that building could mean for you.

Thank you for taking the time to let me share with you how to maximize your Shaklee membership. Customer care is very important to me, so with your permission, I would love to follow up with you, now and then, to make sure you are getting the results and care you need. I also want you to know that I am your resource and advocate, so please call me anytime, with your questions!

To your health,

Pam Cary 630-632-5190

[pamcary@ameritech.net](mailto:pamcary@ameritech.net)

[cary.myshaklee.com](http://cary.myshaklee.com)

***Additional Attachments:***

*Shaklee Difference Letter from Dr. Jamie McManus*

*Nutrition Assessment*

*Learn to Earn Comment Form*

## ***Additional Attachments:***

Shaklee Difference Letter from *Dr. Jamie McManus*

Nutrition Assessment

Learn and Earn Program Information and link

Business Benefits Brochure

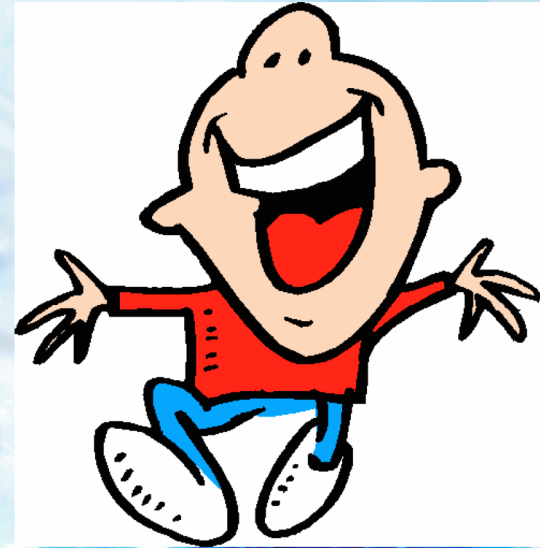
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## Next Steps:

- Close: *Thank you again! What did you find was the most helpful in this discussion? What can I send you to help answer any additional questions? What is the best way to contact you?*
- Send a follow-up e-mail with any additional information they requested (smoothie recipes, Scour Off usage sheet, etc.) or set up an appointment to talk about business
- Send a hand-written note, if you have not already, to say thank you.
- Let them know when you plan to contact them again—before their first autoship goes out, when their Vita Lea runs out, etc.      pam

Great customer service creates...

RAVING FANS  
And  
BUSINESS PARTNERS



francine



# New Member Process Materials

- Welcome letter
- Newsletters – Customer Information sheets
- FaceBook pages and groups
- Referral rewards program
- Business Benefits flyer.. Part-time and full-time options available

francine

See Addendum for an Outline of Additional  
Content and Materials of the New Member  
Appointment or Member Update  
Appointment

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# Jim Rohn – Keys to Success

- Talk to lots of people
- Be real nice to them
- Give them great service

francine

# Action Steps for Session #6 Servicing Customers

- Assemble new member/ member update packets
- Schedule 10 New Member Orientations or Member Update Appointments including business benefits.(may include upline if you are new )
- Create your customer service system ... and then create a document outlining the system so you are duplicable.
- see 100 Days to Amazing Session 9 Role of Leader in Servicing Customers .. Oct , 2016 at [www.BetterFutureStartsToday.com](http://www.BetterFutureStartsToday.com) \_\_\_\_\_ your name
- Set up your working folder, binder, Day timer.. Shaklee Connect app, whatever works for you ... to organize your daily activity.





# Next Session #7 – The Power of Creating the Written PV Plan

h



# Addendum

# New Member Process Steps --

- Day 1-Becomes Member

- Ask to add to Customer FB group

- Ask to add to Newsletter email list

- Add to Follow Up (working) Folder or Connect App

- Send welcome email that should include a personalized message & four attachments:

- Maximizing Membership (personalized) – see addendum

- Letter from Dr. McManus on Shaklee Difference

- Nutrition Assessment or send link to Healthprint

- Learn & Earn form ( [BetterHealthin31Days.com/](http://BetterHealthin31Days.com/)\_\_\_\_ your name)

- \* This should take no longer than 10 minutes!



# New Member Process continued

- Welcome Kit Mailed within 48 Hours

Other possible inserts .. small Shaklee sample, “Thank You” postcard,  
Recipe Flyer (if applicable) & Coupon Card for next order.

## Day 5

Call to make sure they received their order & see if they have any questions on how to get started.

- Set up New Member Appointment to go over welcome email you sent them  
– offer an incentive for attending/

- DAY 15

Call & check in on how they are liking their products & see if they have any questions

## New Member Process continued

- Day 25

Call to remind them of their autoship or need to make an order – emphasize their original goal.

Remind them of the Learn & Earn option they can utilize for an incentive

Ask permission to stay in contact with them regarding specials, events, etc.

- Day 45

Follow up with second order - This is important! - This is when they start to develop their healthy Shaklee habit.

Continued Follow up

Utilize Follow Up Notebook to keep track of communication & incentives offered

- Follow up at 30, 60, etc days after additional orders. At this point, they are getting regular communication from you via email, newsletters and personal phone calls.



# Setting Up The New Member/ Update Appointment

- Ideally, schedule the New Member Appointment as soon as someone becomes a member.

*“Can we set up a time to chat briefly next week when your order arrives? I want to make sure you received everything and if you have any questions.*

*I also would like to go over some information to help you maximize your Shaklee membership.*

*I want to make sure you know about all the discounts and specials that are available to you with your membership.”*

- Or when a past member places an order:

*“Can we set up a time to chat briefly next week when your order arrives?*

*I have recently put together some information that I want to make sure you have available to maximize your Shaklee membership.”*

- Or to resurrect inactive members... Call or text -- and acknowledge

# To Reconnect with Inactive Customer

- Hi Mary... I am just checking in to see how you and your family are doing..I just realized that I have been remiss in not keeping you updated on many of the newest and cutting edge products Shaklee has been introducing .. especially with the cold and flu season before us.
- So I was hoping to reconnect .. And not only to briefly update you on a few of the newest innovations, but also to offer you an additional special 20% discount .
- May I call you?

## New Member Process --Confirm and Send Materials

A few days before the call, send the New Member Packet via e-mail and confirm the time you plan to call them.

Subject: Maximizing YouTo Reconnect with Inactive Customer's Shaklee Membership

*Sarah,*

*These are some documents I will be reviewing when I call you at 2 p.m. CT on Monday. I am looking forward to helping you make the most out of your Shaklee membership.*

## **Follow-Up Process from Executive Coordinator Becky Choate**

What is the purpose of the Follow-up Process?: The purpose is to continue to service your customer with the utmost care. The benefits of doing great follow-up will expedite your success in your business. Your customers will feel cared for and well-educated so that when they have questions or would like to try something new, they will turn to YOU because you always provide excellent service.

### ***Where Do I Start?:***

Initial Follow-up

Closing The Sale

After First Order is Placed

### ***Along the Way:***

New Member Appointment

Learn & Earn Program

Referral Process

### ***Where do I go from Here?:***

Education Process for your Customer

Product Target Process for your Customer

Relationship Building Process for your Customer

[Home > My Business >](#)

### Quick Links

### HELP CORNER

Save time with our indepth FAQs

## Gift Catalog

Send a free gift to anyone in your personal group

### Send a Gift

#### Choose a gift to send

Please Choose One...

- Please Choose One...
- \$10 Off of Shipping & Handling
- \$5 Off of Shipping & Handling
- #00015 Basic H2® Organic Super Cleaning Concentrate
- #00255 Dish Wash Liquid Concentrate
- #00295 Dish Wash Auto Refill 32oz
- #00302 Get Clean Basic H2 Cleaning Wipes
- #00322 Germ Off Fragrance Free Disinfecting Wipes
- #20144 Herblax 60 ct
- #20158 Shaklee Energy Chews
- #20288 Vita-Lea With Iron 120 CT
- #20496 Shaklee Performance Orange 19 oz
- #20497 Shaklee Performance Lemon Lime 19 oz
- #20601 Stomach Soothing Complex
- #20613 Shaklee DR
- #20656 Stress Relief Complex
- #21214 Shaklee Vitamin D3
- #22030 Shaklee 180 Energizing Tea Pomegranate 28 Sticks
- #22061 Shaklee 180 Snack Bar - Assorted Pack
- #22073 Vitalized Immunity

continue >

#### RECIPIENTS

1

all

## BUSINESS LEADERS

We can send \$5 and \$10 off shipping through gift fulfillment!!!



# Strategies for Customer Rewards

Gift Fulfillment – coupon -- Shipping Discounts:

- 1. Post on Facebook – take a picture of your products and share your excitement. Tag me in the post and receive \$10 off your next order!
  - A. Attached is an example of a Facebook post – Remember to tag me, so I know to give you the discount. If we aren't Facebook friends yet, you can find me at: Pam Schmitt Cary
- 2. Write up a testimonial that I can use in our team newsletter and receive \$10 off your next order! Three to five sentences is just fine 😊
- 3. After you complete the Earn and Learn program, you can continue to learn about products and receive \$10 off future orders –
- 4 Listen to webinars, write a few notes and receive \$5 off your next order.
- 5. Offer Christmas in July Sale .. An additional 10% off all orders for a 2 week period .
- 6. Attend any of our monthly events online or in person and receive \$10 off your next order.