

# Monday Wellness Webinars

Feb 29 – A Walk Through the Product Guide

March 7 –Becky and Greg Choate Story and Review of Benefits of Shaklee Business

March 14 -- Nutritional Support for Cancer Patients Dr Steve Chaney

March 21 -- Lyme Disease -- Martha Willmore

March 28 -- Sneak Peak Into the Life of a Shaklee Business Leader –  
Ashley McDonald and Katie Odom

April 4 -- Presidential Master Coordinator Gary Burke presenting benefits of a Shaklee business

April 11 – NO WEBINAR -- Shaklee LOS CABOS DREAM TRIP

April 18 – Hormonal Imbalance – PCOS, Endometriosis

April 25 – Sneak Peak Into the Life of a Shaklee Business Leader

May 2 – Sarah Hein’s Shaklee Story

May 9 – Thyroid Health – Martha Willmore, nutritionist



From Richard Beers

AARP's estimate that half of all baby boomers (76 million) are interested in starting a business and the makings of a massive trend are in place.  
and

"... the concept of starting a business for retirement income will become one of the most significant trends impacting retirement in the 21st century. But it has to start with redefining entrepreneurship and framing it into a retirement lifestyle. That means helping people find ways to turn a passion, hobby, or personal desire into extra money in their pocket... not to mention helping people see the importance of planning for the non-financial aspects of retirement such as replacing a work identity, staying relevant and connected, as well as keeping mentally and physically fit."

<http://www.forbes.com/sites/robertlaura/2014/08/29/would-you-join-a-multi-level-marketing-company-for-retirement-income/#455aa493769a>

becky  


Live  
2015

Stephanie Bruce

Facebook Groups for IOS

after Chairman's Retreat 2016

Amazing group of women - you guys we are seriously lucky to be apart of this company

This business happened to find me when I was least looking for it. But I truly believe it was because I was supposed to know these incredible people - people who make you want to be the best you.

Guys, this isn't a journey of selling .... It's a journey of self development and growth. One thing is true - you will not come out of Shaklee the same person you came in!! ...

And it's worth every minute, every trying time, every hard ship, every time we're told no. It's all worth it!

barb





# Chairman's Retreat Report

## Angie Thomas and Andrea Opalewski

- We all have the capability to do this -  
We are all the same
- Just do SOMETHING
- Sharing with Authenticity
- Circle of Safety
- Roger's Commitment to Leadership





# 8 Weeks To Director

Shaklee Business Training 2016

## Servicing Our Customers

Week # 6  
March 10, 2016



# Our Training Team



Senior  
Executive  
Coordinator  
Harper Guerra



Senior  
Executive  
Coordinator  
Lisa Anderson



Senior Executive  
Coordinator  
Katie Odom



Executive  
Coordinator  
Ashley McDonald



Senior Coordinator  
Becky Choate



Master Coordinators  
Barb Lagoni & Jo Coogan



## Objectives for Session # 6 – Servicing Customers

- To understand the role of the business leader in servicing customers.
  - To learn how to incorporate New Member Orientations into our Customer Service System
  - To understand how to utilize New Member Orientation 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.
  - To hear from several guests how they set up their customer service systems.
- becky



## Key Shaklee Goal 2016 --Consumer Value Proposition – translation – 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. lisa



## 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 lisa

The Goal – integrating BOTH – technology with human factor



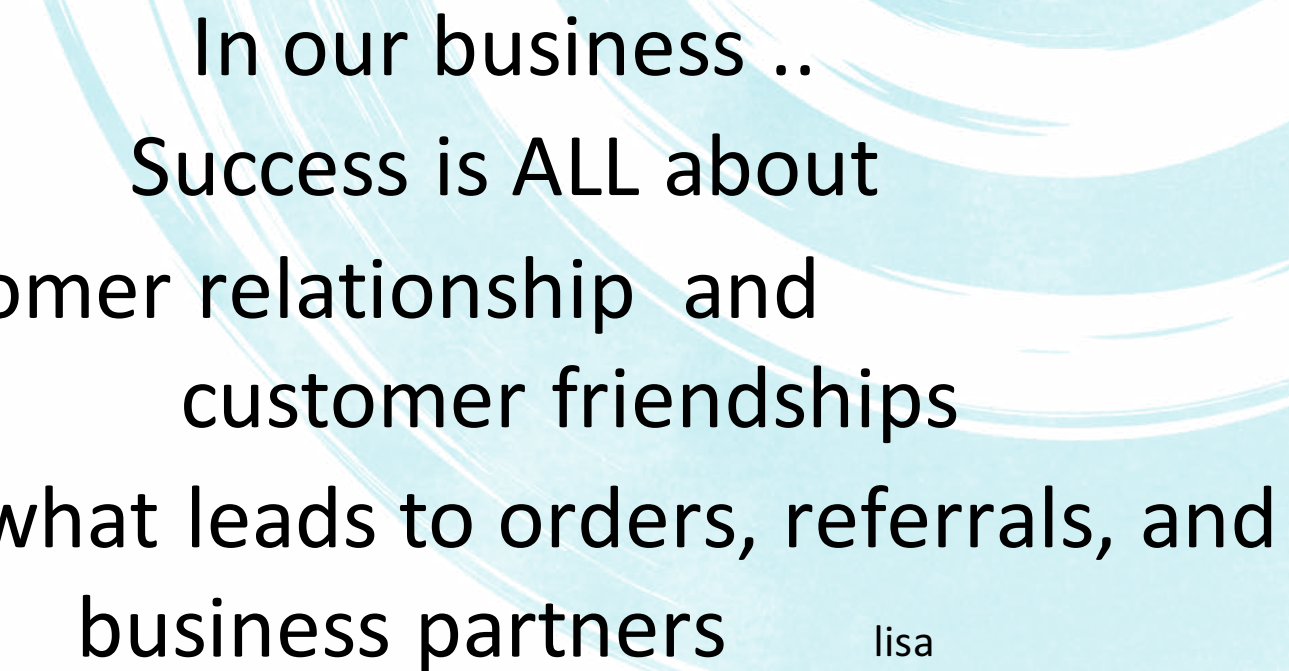
Honor technology,  
but keep people at  
the center.

Roger Barnett

lisa







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

lisa

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

 Shaklee®

 Live  
2015

# Customer Service Tips from Mary Oosterhouse

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. Nurture and nourish.
4. 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.
5. Give people 100% of your attention.  
-- If you aren't taking care of them.. Someone else will.

## Top 10 Tips Continued

6. Send thank you notes .. Respond to “ alerts” on Shaklee Connect Mobile App
7. Excel at communication and conversation .. Comes with practice.
8. Acknowledge the success of others.
9. Educate, recommend and support
10. Appreciate your customers, members, distributors and business leaders.  
The more you 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.

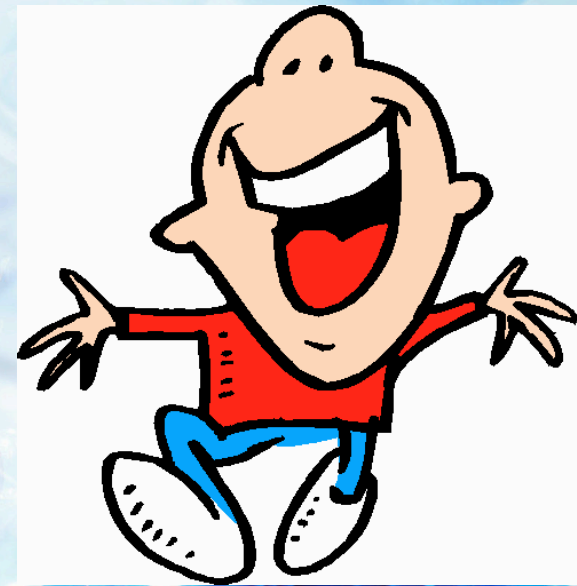
Make your mantra .. “ gratitude always”.

Angie  



Great customer service creates...

RAVING FANS  
And  
BUSINESS PARTNERS



becky

## 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
- about ways to share with others what they are learning to earn additional discounts,
- And benefits of a Shaklee business.

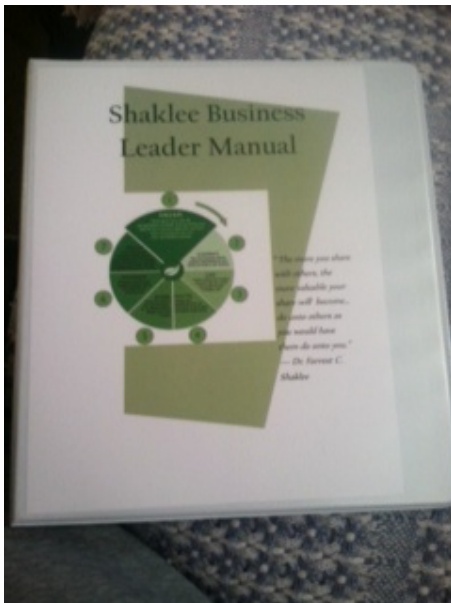
lisa

# Create a System for Servicing and Customer Care

- 3 ring binder
- Alphabetical divider
- Communication tracker sheet  
(see Business Leader Guide )..  
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 )



becky





Set up a 3-ring working binder or equivalent in computer

- Include a calendar with events to which you are inviting people and the outline of your new member process ( see Business Leader Guide )
- Your goals – keep our 90 Day goal ... and goals for current month in front of us every day      becky

## Create Programs and Incentives for Customers to...

- Attend educational events
  - conference calls, webinars, FaceBook events, etc
- Refer friends and others... become more engaged as a “distributor” and earn Power Bonuses ( 15 sponsoring points = \$150 )
- or Join us in our work becky

These can be accomplished with New Member Orientations or individual programs ...See Addendum

## Invite New and Existing Members to A Walk Through the Product Guide Webinar

Offer incentives such as ...

- Free shipping or product with next order ( select product they have not used yet and would likely want to order again )
- Archived at [www.BetterHealthin31Days.com/](http://www.BetterHealthin31Days.com/) \_\_\_\_\_ your name
- “It is important to us to providing good health and nutrition education for our members ... We have a webinar called a Walk Through the Product Guide that is very popular and will introduces our customers to all the Shaklee product lines in an overview .. And for taking the time to watch ( about an hour) we reward you with free shipping off your next order ... and if you will be experiencing additional product line, we will also offer free products...” etc                      becky



## New Member Appointments

### Some Statistics to Encourage Us To Conduct Them

- Harper joined as a distributor in December 2005
- Became a Director in March 2011
- Began building a business in January 2012
- Began doing New Member Appointments in April 2014

It's never too late to start creating powerful duplicable systems or creating improved customer care.

I since have made a goal to do member update appointments with all my previous members as well.

Harper



## Objectives For New Member Appointment:

- Build a relationship
- Introduce them to all of the Shaklee product lines & the Shaklee Difference
- Offer incentives for referrals
- Introduce benefits of the business opportunity

harper

## Setting Up The New Member Appointment

Ideally, schedule the New Member Orientation 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. It should only take about 15 minutes.”*

- 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. It should only take about 15 minutes.”*

# Maximizing Your Shaklee Membership

Welcome to Shaklee! Thank you for allowing me to be a part of your life. My passion and mission is to to be a resource for you and an advocate for your health. Thank you for that privilege and for your support and trust.

The goal for this information is to ensure you get the most out of your Shaklee membership by understanding how to use the discounts, programs and resources that are yours. Shaklee's Use, Share or Build options are a great way to consider how you can benefit the most from all of what Shaklee provides.

I look forward to serving you and continuing on this health journey with you! ~ *Harper Guerra*



## Tips:

Weave in other product lines that they might not be aware of as you share.

Weave in your story if you have not shared that already.

## 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!



## Use ... Share .... Build continued

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 of the profound impact I've seen it have in so many lives and I want you (or someone may know) to know that this is available.

It really is THE BEST option. The stability, integrity, community and wonderful products of Shaklee set the stage for great opportunity, freedom, friendships and financial blessing.

Whether you are interested in a second stream of income or would consider building something new, I would love to tell you more about all that the **BUILD** could mean for you.



Thank you for taking your time to learn the ways to create the most fulfillment using your Shaklee membership.

Customer care is very important to us, **so with your permission** we would love to follow up with you to make sure you are getting the results and care that will create lasting change.

We also want you to know that we are your resource and advocate—please reach out to us anytime with questions!

We are so thankful to be a part of this journey with you and have the opportunity to serve you in this way.

To your health,

Harper & Ryan Guerra

***Additional Attachments:***

*Shaklee Difference Letter from Dr. Jamie McManus*

*Nutrition Assessment*

*Learn to Earn Comment Form*



## 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. harper

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

harper



## Jim Rohn – Keys to Success

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

## Action Steps for Session #6 Servicing Customers

- Download the Member Orientation materials from FaceBook Group Learning from the Masters.
- Schedule New Member Orientations or Member Update Appointments.
- Create your customer service system
- 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 lisa



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

h





# Addendum



# Ashley's New Member Process Materials

## Find in Business Leader Guide at Learning from the Masters Face Book group ...in search bar , type in "Business Leader Guide"

- Welcome email
- newsletters
- FaceBook pages and groups
- Referral rewards program
- Career with a Conscience .. Part-time and full-time options available
- Keep learning ...

# New Member Process Steps -- Ashley

- Day 1-Becomes Member
- Add to any FB groups necessary
  - Better Together or other accountability group you're running
  - Customer Appreciation Group (if applicable)
- Add to Newsletter email list
- Add to Follow Up (working) Folder
- Send welcome email that should include a personalized message & four attachments:
  - Maximizing Membership (personalized)
  - Letter from Dr. McManus
  - Nutrition Assessment
  - Learn & earn form
- \* This should take no longer than 10 minutes!

## Ashley New Member Process continued

- Welcome Kit Mailed within 48 Hours ( see Business Leader Guide .. Go to search tab at Learning From the Masters )
- You decide what YOU want this to look like but we send a 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 to
- DAY 15
- Call & check in on how they are liking their products & see if they have any questions

## Ashley 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.



## Harper's 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 Your 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.*

**First, a little business:****(Harper materials)**

**Activate your account:** You should have received an e-mail from Shaklee with directions on how to do this. If you go to [www.myshaklee.com](http://www.myshaklee.com), then enter your member ID in the Activate your Membership box, you will be prompted to set up a password and then you are good to go! (Please let us know if you need your ID#)

**Options for Ordering:** Call 1-800-SHAKLEE to place your order over the phone. (You must have your Shaklee ID# to order over the phone). Or contact me to place your order for you.

**Member Benefits:**

**Membership Discount:** Your membership gives you a 15% discount on ALL Shaklee products. Membership also qualifies you for AutoShip, AutoShip discounts and special promotions.

**Personal Nutrition and Health Consultation:** Also available to you as a part of our Shaklee family is a personal nutrition and health consultation (over the phone)

**100% Guarantee:** Remember, all Shaklee products are 100% guaranteed, so let me know if you ever are not satisfied with a product. I would love to walk you through what may be the problem or get your money refunded if needed!

*the Shackle Effect<sup>tm</sup>*

Shaklee helps people transform their lives by taking small, simple steps that lead to big results. By making better products that are worth sharing, we create a healthier planet and brighter future for all. Little by little, one by one, we change the world.



100 years of innovation



# The most important Member Benefit: The Shaklee Difference

## 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



Followed by 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?"

## the Shaklee difference

At Shaklee, we believe that nature holds the answers to a healthy and productive life. By using pure and potent ingredients and the foremost scientific research, we formulate nutrition products that are truly life enhancing.

**PURITY**  
Quality ingredients,  
safe products

**POTENCY**  
Extensive studies,  
effective nutrients

**PERFORMANCE**  
Better absorption,  
better results



**Shaklee**  
Creating Healthier Lives<sup>SM</sup>





This is a great time to make sure they are aware of all the product lines that Shaklee offers. If there is time, this is a great opportunity to walk them through the Product Guide if you have not already.

## **Benefits of AutoShip**

**( Harper New Member materials )**

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 at the bottom of the drop down menu to manage clearly!

**“Add one time”** is another great feature for when you want 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.

**Discounts on popular products:** Shaklee also offers an additional 10% off our most popular products and regimens (on top of the already wonderful regimen is discounts). [Click her to view](#) all the products eligible for this additional 10% off.

**Don't miss AutoShip Coupons as well!** Products including Life Plan and Rx for a Healthier Life include a coupon where you can receive any Shaklee product for just \$10!

## Learning more:

## ( Harper New Member materials )

- E-mail Newsletter:** I provide an e-mail newsletter (usually monthly) that includes helpful tips, health information, as well as customer specials. The subject line will usually be Go Well. Be Well. That is what our team strives to help you to do!
- Facebook Group:** This is a great place to get timely information on upcoming health chats and webinars which you can join or also send to others who may want information on that specific health topic. It's also a great place to post your questions and results. If you would like I would be happy to add you!
- Learn To Earn Program:** We believe that education is key element in the health journey so we desire to incentivize you to continue to learn more—not just about Shaklee products but about nutrition and the reasons why our bodies function the way they do.

We have a variety of webinars (both live and archived), audio files and health chats that you can hear from scientists, doctors, nutritionists and testimonies of people who have been where you are. Earn free shipping or a free product by listening to 3 and filling out the Learn to Earn Comment Form before your next order or up to 2 weeks after an order. Check out some of the files at [www.betterhealthin31days.com/](http://www.betterhealthin31days.com/) your name



Home &gt; My Business &gt;

## 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...

continue &gt;

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

## BUSINESS LEADERS

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

## RECIPIENTS

1

all



# Strategies for Customer Rewards

Gift Fulfillment – coupon -- Shipping Discounts:

- 1. Post on Facebook – take a picture of your products and share your excitement about the Shaklee product(s) and tag me in the post. If you do this, I will give you up to \$10 of free shipping off your next order!
  - A. Attached is an example of a Facebook post – just be sure to tag me so I know to give you the discounted shipping 😊 If we aren't Facebook friends yet, you can find me at: Becky Miller Choate.
- 2. Write up a testimonial that I can use in our team newsletter and receive up to \$10 of free shipping 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 our products and get up to \$10 of free shipping – see sheet for details!
- 4. Christmas in July – Lisa
- 5. Listen to webinar, write a few notes and I will give you \$5 off your shipping.
- 6. Attend our event and I will give you \$10 off your shipping on your order. becky