

Customer Onboarding

This is a quick checklist of what needs to be done each time you get a new customer!
You can choose to do this once a week, or just add it to your list each time you see a new PERSONALLY enrolled customer come into your organization.

Remember: The person responsible for setting each new customer up is the person who enrolled them, not someone in your upline. This ensures we are being consistent across the board and are not letting people fall through the cracks. #SPOILTHEM

___ Send them an email (good), text (better), or personalized card in the mail (BEST!)
Let them know you are thankful they are putting these amazing products in their body! Be EXCITED for THEM!

___ Ask them to please let you know the moment they receive their products!! This is another “touch point” to help build belief and just have FUN building that relationship even more!
When they message you, celebrate!! Be so excited FOR THEM and let them know you’re here for any and everything they need! AND..remind them to never miss a day of the products... :)

___ Ask them a few questions: 1) How’s your sleep? 2) How’s your energy? 3) Do you have any aches and pains? 4) Do you have any major medical problems?

This is to make them THINK!! A lot of times people ignore those things going on in their bodies so they aren’t paying attention to what this is really doing for them. Let them you will be adding them to some important exclusive Facebook groups where they will enjoy looking around at the incredible science and testimonials. I say, “I’m going to add you to our customer only page - you’re going to love it — you’ll see so much there for you, your friends, and family!” They’ll agree to that - those pages are filled with such VALUE for them! Just don’t add them without letting them know - that’s a big NO NO. :) If there are any specials going on - this is where they’ll see them, but PLEASE remember to tag them on whatever the special is so they can SEE it and they know you’re thinking of them!

___ If they did NOT order AXIO, send them SAMPLES with your personalized thank you card!
You could also send PhysIQ CURB or PhysIQ BEAUTY. People LOVE free samples with thank you cards! I get SO many AXIO additions because of THIS.

Hint: Each time you get a new customer, you can add these appointments to your Google calendar, paper appointment book, or whatever you use to keep track of daily activities.

___ Add them to:

1. “We Love our Lifevantage Customers” Facebook page.
___ Let your Pro 5 or higher closest upline know you have added a new person to the page. Important or else they’ll sit in there and won’t be approved.
___ Tag them in the Pinned Post.
___ Tag them in a story that pertains to them.
2. “Healthy Quest” (if they are not already there from when you prospected them the first time)

___ Follow up with them 1 week after they signed up (ONCE A WEEK FOR A MONTH)

This ensures good customer care as they are starting something new and may have questions but don't want to bother you.

___ Follow up with them 1 month after they start product

This lets them know that you care! Answers any questions, follow-up with them on the personal evaluation form!! You may hear some AMAZING things happening in these customer's bodies that need to be shared on one of the groups!!

Always be excited and convicted with what we have our hands on! This may be a great time to connect a third-party person with them regarding anything specific to them.

#WEARECONNECTORS

___ Follow up once a month after a customer starts taking the product, whether a quick text, email, tag on Facebook pages, etc. SHOW YOU CARE. Ask if they've thought of anyone that could be blessed by the info. Customer referrals are the BEST! This is also around the time frame that they build their belief because they have experienced the incredible benefits of activating their bodies and is also the time the business looks pretty appealing since they are already talking to their friends and family about these products. Keep that relationship open for the possibility of an amazing business partner.

___ Added ideas:

___ Tag them in testimonials and stories you think they may be interested on the Facebook pages.

___ Encourage them to ENGAGE on those walls and continue to learn about their health.

___ Make sure they are on subscription order monthly.

___ **IMPORTANT:** The 27th of every month, go through your customers and check to make sure they each had a subscription order that went out. Most of the time if it doesn't go out, it is a card error and they are unaware so make sure you ask them about that with a simple, "I saw your subscription didn't go out this month. I am just following up with you on that because most of the time that is due to a card expiring or being cancelled and replaced. I didn't want you running out of product, so just let me know if I can help resolve this problem."