

Enroller Change

1



Here is an example of an enroller change. A leader introduces a new member to dōTERRA. The leader keeps the enrolment and places the new member under the frontline member.

2



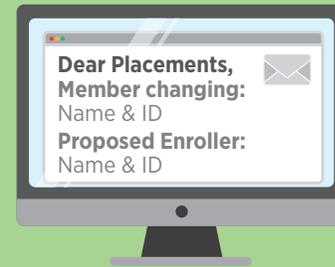
The leader's frontline member has two qualifying legs and needs one more enrolled member to hit a rank.

3



The current enroller decides to give the enrolment of the new member to the current sponsor to help rank advancement. The enroller sends an email to Placements from the email address listed on their account.

4



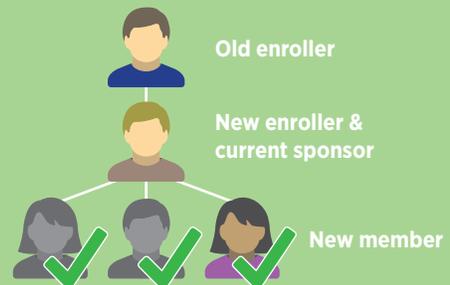
In the email, the enroller states that he or she would like to gift the enrolment of the new member to the current sponsor.

5



Placements will send an email response. The leader should hear back within 1-3 business days.

6



Once the move is complete, the change will reflect in the back office within 24 hours.

What is an enroller change? When a leader enrolls a member and holds the enrolment, that leader is able to request to change the member's enroller. This change can happen at any time.

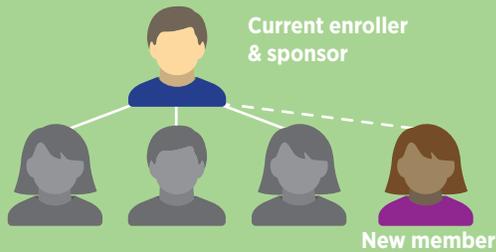
What are the benefits? An enroller change can help a leader maximise the compensation plan. This can help a downline rank advance which in return can help the original enroller rank advance. Fast Start bonuses are also paid based off of enrollership.

It is important to note that an enroller change only affects enrollership. Sponsorship will not change.

What is the difference between 1st time and a 2nd time enroller change? Each member is eligible for one enroller change; however, if the member was enrolled after Sept 22, 2014 the enroller can request a second enroller change to go back to the original enroller, subject to company approval.

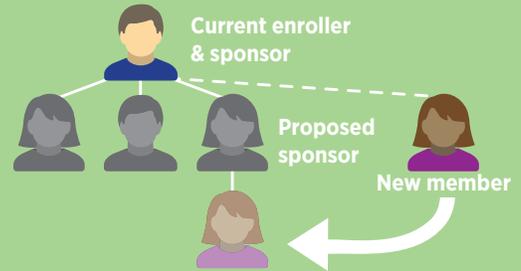
Sponsor Change

1



Here is an example of a sponsor change. A leader introduces a new member to dōTERRA. The leader keeps the enrolment and places the new member on their frontline.

2



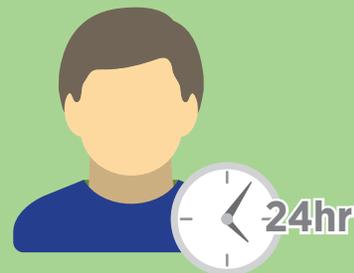
The leader thinks the new member and a frontline leader would work well together. The leader decides to place the new member on that leader's team.

3



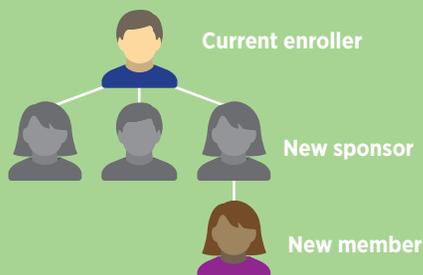
The leader logs into the back office to Teams tab > Sponsor Changes and makes the change within 14 days of the new member enrolling.

4



The change will reflect on the back office 24 hours after making the change.

5



Once completed, the change can be verified through the back office.

6



Current enrollers have the option to email Placements rather than requesting through the back office. If emailing, members should expect to hear back within 1-3 business days.

What is a sponsor change? When a leader enrolls a new member, that leader has 14 days to change the placement or sponsor of the new member. This is called a sponsor change.

What are the benefits? A leader can maintain enrollership of a member they introduced to dōTERRA and continue to earn Fast Start while being able to strategically place a member's sponsorship where they will be best supported and to structure for Power of 3 and Rank.

Sponsor changes must be made within 14 days of the new member's enrolment (enrolment day counts as day 1). For questions requiring exceptions outside of this 14 day period please contact Placements.

Exception Requests

1



Leader mentions they would like to submit an exception. Account Manager asks the reason for the request, considers alternate approaches, and evaluates against the Exception Committee Guidelines. Account Manager also helps the leader understand that exception requests are never a guarantee.

2



Next, using the correct forms the account manager walks the leader through how to submit an exception request, either through the Back Office or email (DocuSign or pen-to-paper signatures), reminding the leader to provide as much detail as possible to help the committee understand the reason for the request.

3



The account manager explains the timeline to submit the exception request(s); Requests submitted from the 1 to 15 of each month will be reviewed at month end meeting. Requests submitted 16 to month end will be reviewed at the following month on the meeting held before the 15th.

4



Once the forms are complete, the account manager should help the leader verify the forms with Placements before submitting the request. For DocuSign, confirm that the Certificate of Completion is included.*

5



The account manager can help the leader by following up with Placements on the Committee's response. If the leader has questions, the account manager can work with Placements to explain the reasoning behind the response.

6



Remember that every move is case by case. An account manager does not have the authority to approve a request and should always remind the leader of the appropriate exception committee process.

What is the Exception Committee? The Global Exceptions Committee is a group of individuals, representing different areas of the business, that meet twice a month to discuss organisational moves that are an exception to the policy. Although requests submitted are never a guarantee, there are typically four optional responses to requests: yes, yes with requirement, no, or alternative placement.

What are the benefits? A leader can have requests involving unique situations that would generally fall outside of policy reviewed for consideration.

*Their role of an account manager in the exceptions process is a facilitator and a guide. Account Managers can help verify signatures, ensure the form is filled out correctly, and that it is ready to be reviewed by the committee. Account Managers help guide leaders to submit requests that will meet the underlying needs and have potential of being approved. If an exception isn't likely to be approved or isn't in the leader's best interest it is best to redirect their focus earlier than later.

Exception Committee Guidelines

These are guidelines for requests that are good candidates for exceptions. Requests that do not meet these guidelines may be submitted but are less likely to be approved. Meeting these requirements does not guarantee approval.

1

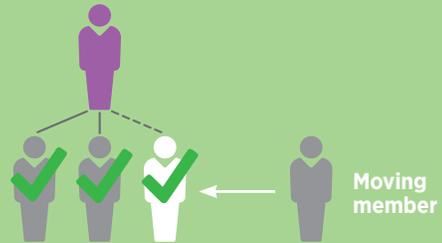
Moving significant volume

\$900+

Moving significant organisational volume such as 900 + (USD) organisational volume is less likely to be approved

2

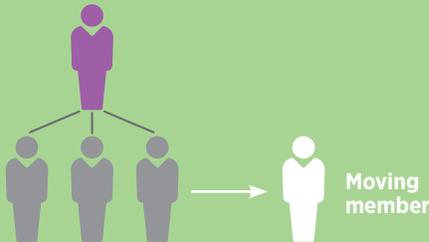
Creating a Power of 3 or Rank



If the placement of the new position builds or solidifies a rank or Power of Three bonus, then it is less likely to be approved.

3

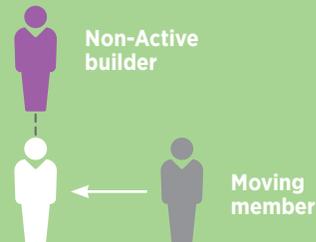
Breaking a Rank



If the move would break rank for someone in the upline, then it is less likely to be approved.

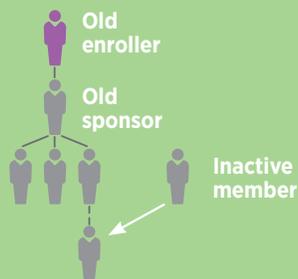
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Moving to a Non-Active Builder



If the proposed sponsor is not building, has not enrolled a new member in some time, or is not actually qualifying for commissions, then it is less likely to be approved.

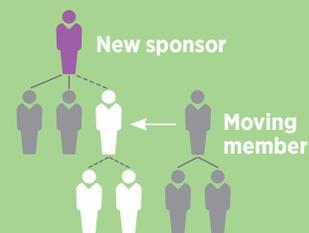
5



If the upline requests to pull an member from an active builder but already holds enrolment, then it is less likely to be approved.

6

Placements Assumes the Downline will Move



Unless otherwise indicated in the request, the committee will assume the individual requested and their downline will move. The exception is sponsor changes outside of the enroller tree where generally only the person will move.

What are the exception committee guidelines? The Global Exceptions Committee has general guidelines that help determine the response from the committee.

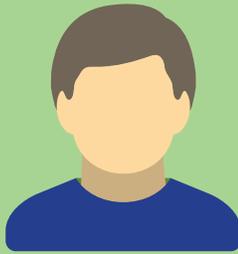
What are the benefits? A leader can have an alternative placement option considered by a committee.

A key reminder that these are just guidelines and each exception submitted is reviewed individually, case by case. Meeting these requirement increases likelihood but does not guarantee approval.

Requests that are denied can be submitted as the same request to be reviewed again after 4 months with new signatures. However, an alternative proposed placement could be reviewed the following meeting if signatures are correct and the forms are filled out correctly.

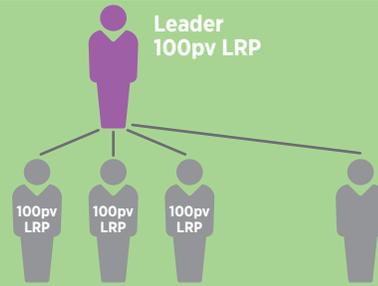
Power of Three

1



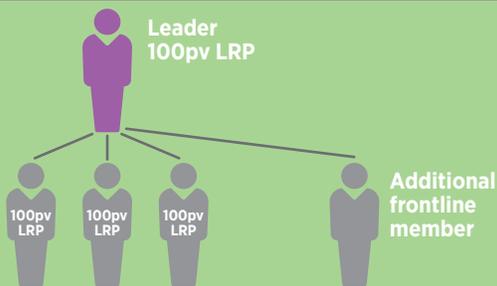
A leader who wants to qualify for Power of Three, must be on the Loyalty Rewards Program and purchase 100pv each calendar month.

2



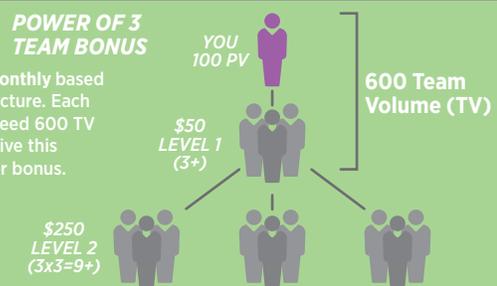
The leader has three additional frontline members who also purchase 100pv on Loyalty Rewards Program in the same calendar month as the upline member.

3



The leader and their frontline members volume must accumulate to a total of 600 team volume. The leader is then qualified for the \$50 bonus!

4

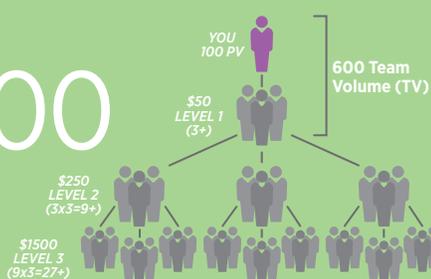


POWER OF 3 TEAM BONUS
Paid monthly based on structure. Each team need 600 TV to receive this sponsor bonus.

If three members of that leader's frontline meet the same \$50 bonus qualifications, the leader will qualify for a \$250 bonus rather than the \$50!

5

\$1500



Or, if three members of that leader's frontline qualify for the \$250 bonus (or higher), the leader will qualify for a \$1500 bonus rather than the \$250!

6



This bonus is paid out each month with other primary commissions. As long as qualifications are met, a leader can earn this bonus every month

What is the Power of 3 Bonus? It is a bonus that incentivises members to share products and properly structure their organisation.

What are the benefits? Members have the potential to earn \$50, \$250, or \$1500+

Members can place multiple LRP orders that cumulate to 100pv to qualify, it does not need to be a single 100 PV+ order.

Once a \$1500 Power of 3 structure is completed, the leader can start creating an additional PO3 structure. The leader's personal LRP order must increase by an additional 100 PV for every Power of 3 structure they earn on. (Example, to earn a \$3250 PO3 bonus the leader would need at least 300 PV on their personal LRP to qualify.)

Inactive Members

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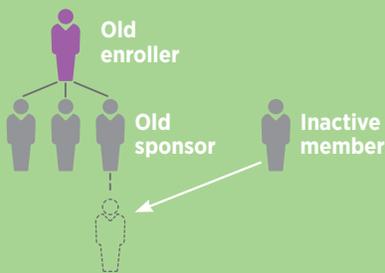
A member has been inactive*, not placing an order in over a year, and would like to start purchasing product again.

2



The member contacts his or her old enroller. They discuss whether the reactivating member would like to start building, sharing, or purchasing products.

3



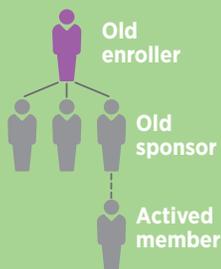
Based on that decision, the upline suggests the best placement for the reactivating member, whether that is under the previous sponsor or another individual.

4



The reactivating member sends an email request to Placements from the email address on file for their account including the name and ID number of the proposed enroller and sponsor.

5



Placements will reactivate the member and send an email confirmation once the move is completed. The new member should show up in the back office within 24 hours.

6



Once complete, the reactivated member should place an order within 48 hours to ensure the account is not automatically terminated for inactivity.

What are reactivations? When a member who is inactive* reactivates to start placing orders again.

What is the benefit of activating an inactive member? The inactive member can start ordering again and has the possibility to change the enroller and the sponsor. *An inactive member is someone who has not placed an order in 6 months or more (Premier rank or below), or 12 months (Silver rank or above) and has not earned commissions during that period. Retail orders from retail member's on the frontline are considered activity as they result in commissions earnings. Members who are seeking to be inactive are only allowed to return product within the current commission period. When activated and moved this is called a 6-month inactive move.

*Terminated members, status 4, or members that have not ordered in 12+ months can request to be reactivated and move.