

Customer Start Strong Checklist

Name: _____

Date: ____/____/____

Which Kit Was Purchased: _____

WHILE WAITING FOR KIT TO ARRIVE

- Welcome your new customer and share excitement.
- Schedule a Lifestyle Overview.

3-10 DAYS AFTER KIT ARRIVES

- Provide new customer or Wellness Advocate with the Empowered Success *Live* guide. Recommend an essential oil reference guide of your choice.
- Conduct a Lifestyle Overview to support health goals and integrate dōTERRA® products into their lifestyle. Refer to the *Launch* guide, pages 12 and 13, for how to conduct a Lifestyle Overview.
- Support in enrolling in Loyalty Rewards Program and plan next three LRP orders.
- Connect to key support and appropriate social media group(s).
- Connect to resources, such as the Empowered Life Series webinars.

EVERY MONTH

- Communicate monthly specials and promotions.
- Share tips.
- Promote continuing education opportunities.

EVERY 60-90 DAYS

- Offer additional Lifestyle Overviews.
- Check in and support in reaching health goals.

IF NO ORDER IS PLACED IN 60 DAYS

- Make customer support calls (product education is likely still needed).

