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).