Customer Onboarding

AFTER YOU ENROLL A CUSTOMER

Customers are the foundation of your business. The goal is not to just have customers but to create Raving Fans! This first page should all be done within the first 24 hours after they have enrolled!

☐ If your customer has Facebook, make sure they are added to our team customer and guest page! (You have to be friends on FB.)

Once you have added them to our group, let your enroller & support team MC2 or higher know so they can immediately approve them! This step is crucial. After they have been approved, let your customer know to click JOIN into the group so they can see all your tags specific to them or else they won't see what you're tagging them on! Try to do all of this at once asap. Remember to tag them on the pinned post and tag them on anything specific to them! This is about THEM! Your customers will experience ongoing education, testimonies and get heads up on sales! This is where BELIEF is BUILT!

☐ Ask your customer what form of communication they prefer for future correspondence.

Once you know this, make note of it in your app in the notes section, or on the customer tracker form. i.e. – texting, emailing, messenger, etc. If you did a 3 way chat with your customer, keep it in motion. When your customer has a story to share, share it in the 3rd party chat so the 3rd party person can celebrate as well. Please ask your customer to share their story in the customer page to bless more people! When people comment on their story, they'll feel great knowing they made a difference! Many customers upgrade to consultants! Blessing others is the best!

☐ Ask your customer to let you know the moment they receive their products!!

This is another "touch point" to help build belief and have FUN building your relationship with them. When they message you, celebrate -- SO excited for you!!!! Remind them to never miss a day of their products!

☐ Let your customer know you will be sending them a welcome email with some important information.

The welcome email is found in this section of customer care in the team website. You will simply download the document and copy and paste the verbiage into an email. Add in their Customer ID #, the password if you set up their account for them and the date that their next shipment will be sent. Be sure to also attach the Health Evaluation Checklist which is found in the same section. This checklist gives them a baseline of where they are before starting their products! So important because many times we can forget how we felt before we started feeling better!

☐ Let your customer know you have sent the welcome email so they can be on the lookout for it.

After you have done this, tell them you will be sending them a quick 1-minute video to show them exactly how to navigate their customer site. This short video is found in your onboarding training in the Customer Care section. There is a link to download the video and save it to your phone, so you always have it.

☐ Send a THANK YOU card!

You taking the time to send a thank you card goes a long way! It does not have to be a fancy card. Just a handwritten note to thank them for trusting you enough to place their first order with you. If they did NOT order AXIO, send them a sample or two of AXIO. One caffeinated and one decaf is a great idea! Pro Tip: Send the Brain Mapping Video with Dr. Fannin on AXIO.

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Customers are your warmest leads for future consultants. Your follow up matters!!!
If you take good care of them, they are that much more likely to refer to you!

☐ Follow up!

- Whether you write it in your calendar or make an alert in your online calendar, once you know they have started their products, follow up after 1 week.
- Do they have any questions and how are they feeling so far?
- Ask them about the AXIO samples you sent and see if they have used them yet. If not, instruct them and encourage them how to do so. Pro Tip: Send the Brain Mapping Video with Dr. Fannin on AXIO.

☐ Follow up weekly in the first month!

See how things are going! If they haven't felt anything yet, remind them it's early! Keep going! So excited for them! ! This is a great time to invite them to an online presentation to learn more about the products and/or tag them again on some posts in our customer page that will encourage them to keep going, have hope, and be excited! Consider tagging them on another post or two in the customer page!

☐ Check on their Subscription:

After the last subscription has run on the 25th, go through your customers and make sure all subscriptions have run for the month. Many times, if it didn't go out it may simply be that they need to update their credit card. An easy follow up for that is: *"I saw your subscription didn't go out this month. I wanted to follow up with you because most of the time this will happen if the credit card on file needs updating. We can't have you to run out of product! I'm here to help!!"*

☐ Follow up monthly!

Again, make notes in your calendar or find a system that works well for you to remember to follow up. Your follow ups at this point don't always have to be about LifeVantage. Check in on their family, celebrate a post they made, tell them you were thinking about them and hope they have a great day.

☐ Specials or Sales:

When specials or sales are happening, reach out to them personally and let them know it's coming. Let them know that these moments become a great time to try some new products!

☐ The Testimonial:

As you continue to check in on them, when that moment happens that they share a testimony of how the products have helped them, CELEBRATE with them! Remind them where they started and encourage them to write up their story and put it in our customer page to help others! Take this opportunity to ask for some referrals as well. Who do they know that could also benefit from the products. This conversation might lead to them wanting to share with their friends themselves and upgrading to consultant!