

Customer Onboarding Checklist



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 to add them.)
- ❑ Ask your customer what form of communication they prefer for future correspondence.
- ❑ Ask your customer to let you know the moment they receive their products!!
- ❑ Let your customer know you will be sending them a welcome email with some important information.
- ❑ Let your customer know you have sent the welcome email so they can be on the lookout for it.
- ❑ Send a THANK YOU card!
*If they didn't order AXIO consider sending a few samples!!!

FOLLOW UP

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!
- ❑ Follow up weekly in the first month!
- ❑ Check to be sure their subscription went out. If it didn't process, here's an example of what you can say:
"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. I don't want you to run out of product. Let me know how I can help."
- ❑ Follow up monthly!
- ❑ Let them know when Specials or Sales are happening.
- ❑ Celebrate when the products have helped them and ask for their testimonial.
- ❑ Ask for referrals.