

## HOW TO FOLLOW UP WITH NEW CUSTOMERS

This training provides you with specific follow-up steps to build strong trusting relationships with your customers. There are also sample messages you can personalize to make your job easier. Once you sponsor new customers with Shakeology® Home Direct (HD) or a Beachbody® Challenge Pack you should move them from your [Contact List](#) to your [Customer Follow-Up Tracker](#). This tracker will help you stay connected and provide excellent Customer Service. You can also use the Customer Follow-Up Tracker with your Coaches who are not yet ready to build their business to help stay engaged and supportive until they become an active business builder.

### WHAT TO EXPECT:

In this document you'll find sample messages and tips to help you complete each step of the process, which includes:

**Step 1:** Notify your customer that their order has shipped.

**Step 2:** Follow Up within 24-48 hours after order is received to reinforce importance of drinking Shakeology.

**Step 3:** Follow Up after first week to see how they like Shakeology.

**Step 4:** Follow Up after second week and send Shakeology reinforcement video.

**Step 5:** Follow up one week before HD order reships to confirm flavor and remind of credit card being charged.

**Step 6:** Follow up every month to offer support, answer questions, etc.

## STEP ONE: ORDER HAS SHIPPED

Track your new customers' orders from when their orders ship. You can view tracking information using the "Customer Orders" report located under "My Orders" > "My Business" menu of the Coach Online Office. When you have confirmation the orders have shipped, be sure to reach out with a text, email, social media message, or phone call letting them know their orders are on their way. Fill in the day of the month your customers placed their orders on your Customer Follow-Up Tracker so you can follow up with them each month before their subsequent HD orders are processed.

Sample Messages	Tips
<p><u>Example 1:</u> Hi (Name), just wanted to let you know your order has shipped! You are only a few days away from receiving it and getting started in our Challenge Group. Watch for a post with some of my favorite Shakeology recipes. You're going to love the taste!</p> <p><u>Example 2:</u> Hi (Name), your order is on its way! I'll contact you again as soon as it arrives; I want to be sure you get started right away to (enter what results they want). I'll send you some great Shakeology recipes to try!</p>	<ul style="list-style-type: none"> <li>• Following up and letting them know that their order is on its way is critical. It is the beginning of ongoing communication to connect with them and reinforce that they made the right decision.</li> <li>• Remind them of the value and benefits they will experience with Beachbody to keep them excited and motivated to start.</li> </ul>

## STEP TWO: WITHIN 24 TO 48 HOURS AFTER ORDER HAS ARRIVED

Within 24 to 48 hours after their order has arrived follow up to reinforce the importance of drinking Shakeology every day, and following the recipes to make sure they have a great experience.

Sample Messages	Tips
<p><u>Example 1:</u> Hi (Name), I just saw that your order arrived. This is your lucky day to start enjoying the great benefits of Shakeology. Remember to follow the recipe I sent you and use your blender and add ice. I'll check in with you tomorrow to see how you liked it!</p>	<ul style="list-style-type: none"> <li>• It's important to remind them again to use the recipe you provided to make their Shakeology.</li> <li>• Send them more of your favorite recipes and get them connected to your Challenge Group for daily support.</li> <li>• Be sure to use the <a href="#">Customer Follow-Up Tracker</a> to keep track of the conversations you are having with each of your customers.</li> </ul>

<p><u>Example 2:</u> Hi (Name), just saw your order arrived; don't forget to follow the directions I sent for making your Shakeology. Have you decided if you are going to drink it for breakfast or lunch? Make sure to keep an eye out for the invite to join our private Facebook Challenge Group; I'll send it out later today.</p>	
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### STEP THREE: END OF THEIR FIRST WEEK

Follow up with your customers at the end of their first week to find out if they tried Shakeology and how they like it. This is a critical follow-up step, because if they are not satisfied, you'll want to find out why and resolve any issues.

Sample Message	Tips
<p><u>Example 1:</u> Hi (Name), I'm so glad to get to talk with you today. I wanted to follow up and find out what you liked about drinking Shakeology?</p> <p><u>Example 2:</u> Hi (Name), so what do you think of Shakeology? Did you use the recipe I sent?</p>	<ul style="list-style-type: none"> <li>• If you haven't already connected via phone, FaceTime, Skype, Google+ or Zoom, this is the perfect time to have a "live" connection with your customer.</li> <li>• Listen to their response. If there are no issues, then reinforce how Shakeology will help them achieve their goals. If they did have an issue, make sure to ask questions and find out what the problem was so you can do your research and offer suggestions to make it better.</li> </ul>
<p><u>Customer Liked Shakeology:</u> That's great, I knew you would love it! Remember to check in every day on our private Facebook Challenge Group page to keep us updated on your progress. You are going to love our Group; it's the best place to share tips, ask questions, and get motivation!</p> <p><u>Customer Had Issue With Shakeology</u> "You know, that is the first time I have heard that as a concern and I want to give you the right answer. Can I reach out to my Coach and get back to you about that?"</p>	<ul style="list-style-type: none"> <li>• If they haven't joined the Facebook group this is a great time to remind them and help them get connected.</li> </ul>

Remember, if your customers are having issues with Shakeology, the best way to resolve them is to ask questions. It's important to understand exactly what the issues are so you can address them appropriately. It could be how they mixed it, or perhaps they didn't follow the recipe and just made it with water. Or they don't like a particular flavor. If they purchased the 24 multi-flavor packs encourage them to try another flavor with your favorite recipes until they find one they really like.

If they are having any other issues, refer to the [Shakeology FAQ](#) for answers.

### STEP FOUR: END OF THEIR SECOND WEEK

At the end of their second week it's the perfect time to follow up and reinforce the benefits they are experiencing by sending them a Shakeology video. In addition, you'll be giving them a tool they can use to share with others when they are talking about the great results they are getting from Shakeology.

Sample Messages	Tips
<p><u>Example 1:</u> Hi (Name), I'm so glad you are feeling and seeing the results of Shakeology. Here's a great video that talks more about the benefits of drinking it every day. It's a perfect video to share with others if someone has asked you about your results and what you are doing.</p>	<ul style="list-style-type: none"> <li>You can find the top 5 most frequently shared Shakeology videos in the <a href="#">Shakeology Product Tool Kit</a>. Log in to the Coach Online Office, click on "Product Tool Kits" under the "Sales &amp; Marketing" menu and then click on the Shakeology Product Tool Kit.</li> </ul>
<p><u>Example 2:</u> Hi (Name), You are going to love this video. It talks about many of the benefits of Shakeology that you are already feeling! You are going to love Shakeology even more after watching this!</p>	<ul style="list-style-type: none"> <li>Make sure to always share videos directly from the Coach Online Office Video Library to ensure the video links back to your Coach account.</li> <li>Personalize the message to include the progress they're having with their fitness program if they are in your fitness Challenge Group.</li> </ul>

### STEP FIVE: ONE WEEK BEFORE THEIR NEXT HOME DIRECT ORDER IS PROCESSED

Connect with your customers one week before their second Shakeology HD order is processed, which occurs on the same day each month. For example, if their original order was on April 8th, their second HD order will go through on May 8th, therefore you'd contact them by May 1st. We've learned from our most successful Coaches that this is an important and timely communication. It helps remind your customers that their credit cards are going to be charged and it's the perfect opportunity for them to make a change if they decide they want to try another flavor.

Sample Messages	Tips
<p><u>Example 1:</u> Hi (Name), guess what? It's time for your next shipment of Shakeology! It's going to ship next week, so I wanted to be sure to reach out to you and let you know in case you want to switch from the 24 multipack to your favorite flavor in the 30-day bag. Let me know if you do so I can help you update your order.</p> <p><u>Example 2:</u> Hi (Name), your next order is about to ship let's talk about any change to a new flavor you might want to make.</p>	<ul style="list-style-type: none"> <li>• This is another great time to connect "live" with your customer. You can talk over the phone, use FaceTime, Google+, Skype, or even Zoom.</li> <li>• Take the time to add a personal touch, which makes the difference between "average" and "excellent" Customer Service.</li> </ul>

### STEP SIX: ONGOING MONTHLY FOLLOW UP

Ongoing communication and follow up is important to not only retain your customers, but also to make sure they stay on the path of achieving their goals. Here are a few examples of how you can follow up each month to keep your conversation alive and continue building a solid trusting relationship.

✓ Send reminders that their HD order is going to process and make sure they know of any new flavors they may want to try.	✓ Offer products to support their new healthy lifestyle, like E&E Energy and Endurance®, Results and Recovery Formula®, Cordastra®, Core Omega-3™.
✓ Contact customers whenever there is a new product available and ask if they want to be the first to try it, or know anyone that would <b>be interested</b> .	✓ If they are doing a fitness program, ask them how they feel and what workout they loved the most from each phase of their program.
✓ Send new Shakeology recipes for them to try and ask them what they think.	✓ Send a news story or article that speaks to their interests or hobbies.

By following up every month you'll be able to find out what's working for them, offer additional products or programs to support their goals, present the Coach Opportunity when you feel they are ready to join your team as a Coach.

The [Customer to Coach Guide](#) is a resource to help determine if your customers are ready to become Coaches. In addition, if you notice that one of your Challenge Group customer's participation is dropping off, make sure to follow up with them right away. Ask questions to find out what's going on and let them know how much they are missed. Help them get reengaged and working toward their goals.

## NON-CHALLENGE GROUP MEMBER: ENGAGEMENT AND FOLLOW UP

For customers who aren't already in one of your Challenge Groups, make sure to invite them to join one of your other Facebook groups to help keep them connected and excited about their health and fitness journey. The value in these groups is not only that they're free; it's the relationships, advice, and support that members provide each other. Here are a few examples of groups that Coaches are creating to offer ongoing support to their customers.

Group	Purpose of Group
<b>Shakeology Group</b>	This group can include your new Shakeology customers and your customers who've been drinking Shakeology for years. New customers will benefit from seeing Success Stories, learning new recipes, and getting encouragement and support from longtime members.
<b>General Health and Fitness Group</b>	This group can include Shakeology customers, fitness customers, and prospects that are already working out and eating healthy, or who are looking to make a health and fitness change in their life. Members provide support and motivation to each other and prospects will see comments on the Beachbody fitness programs and results people are getting from Shakeology, which opens the door to organic, natural conversations.

Regardless of whether your customer joins one of your Facebook groups, your job is to continually offer excellent Customer Service by staying consistently engaged in their health journey. Follow-up not only keeps your customers engaged in their programs, it builds trust, develops loyalty, and increases referrals. It's also the best way to help your customer see the opportunity to pay it forward and become a Coach on your Team.