Team RISE
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How to Hold Follow-Up Appointments

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6 Parts:

1. Agenda
2. Health Goals (revisited)
3. Wish List
4. Setting Up the Loyalty Rewards
5. Asking For Referrals
6. Exploring the Business

1. Agenda

"*Before we get started I just want to let you know what we are covering today. We will review your health goals, make a list of products that will help support those goals, I'll show you how to order so you can save the most money, and then we'll talk just little about the business side of doTERRA because most people want to know even just out of curiosity. Is there anything else you'd like to go over today?*"

2. Health Goals

"*I have my notes here on your health goals from our 1st meeting but could you just tell what your goals are so I can make sure I got everything correct last time?*"

"*Great, what else came up in the last few days?*"

"*Some of my customers struggle with _____________, _____________, or _____________. Are any of those an issue for you?*

3. Wish List

"*Ok let's grab the doTERRA Essentials Booklet that came with your order. I don't want to forget anything that would really help you.*"

"*We are going to make a list that you will be able to keep for reference and add to it over time. Unfortunately, it's not likely that we will connect every single time you think of something that may relate to our products. I wish I were a mind reader but this list will help you. And you may want to get a resource guide like ______ to help you as stuff comes up.*"

"*Do you have a pen and piece of paper? Ok cool, go ahead and write these down.*"

(Explain all products, even ones covered in initial appointment, that meet their goals/wants.)

4. Setting Up Loyalty Rewards

"*Now let me explain the best way to order. You will definitely want to use the Loyalty Rewards Program, because you get ___(benefit)___. In fact, that savings mean that you will in essence get a free ___(product they love)___ often, since you will go through that pretty fast. In fact, last month, I ___(something you got free or savings you received)___.*"

"*Let's set up an alert in your phone for a few days before the auto-ship so you can change it or delete it.*"

"*Now, let's go to the website. Your customer number and password is _________. (log in and give them a quick overview of the site) Let's set up your next order. You can set it for any day you want, like this... Based on how much you are going to use X product, you will probably need more of that, so let's add that. What else do you want to add? Ok great, how does that feel?*"

5. Asking for Referrals

"*Thank you for introducing me to (insert the name of the referrals they gave you in the 1st appointment).*"

"*I'm just curious, who else has come to mind that you think would benefit from this presentation?*"

"*If you could introduce me to 5 or more people via text or FB then I'll give you a special gift (special blend?) as a thank you.*"

6. Exploring the Business

"*The last thing to review today will be the business side. Have you ever thought about running your own business?*"

[If yes] "*Ok great, why is that so important to you?*"

[Yes or no] "*Here is how it works. You go around doing conversations just like the one I did, which was pretty simple right? I can show you how. You will earn commissions on each sale, and as your customers, repeat orders, and team members grow, you will earn additional bonuses.*
What a lot of people love about it is the flexibility and after a while, the passive income. Is this something you would like to learn more about?"

[If yes] "*Ok, let's set up a time to go over this in more detail and your next steps. We can do ____or _____, which would be better for you?*"

[If no] "*Ok, no problem. The door is always open should you change your mind. And the next step would be to learn more and set up a plan. I promise to never be a pushy leader. We will focus only on you reaching your goals.*"