

# Four-Month Customer Follow-Up Guide

Customer: \_\_\_\_\_

Phone: \_\_\_\_\_

Date Enrolled: \_\_\_\_\_

Marketing Executive: \_\_\_\_\_

Phone: \_\_\_\_\_

Promotion: \_\_\_\_\_

PC Yes \_\_\_\_\_  
Date  
(Kit, order placed, PW in)

- 1st Month** —
- Do a quality *Melaleuca: An Overview*.
  - Explain Preferred Customer program and Back Up Order.
  - Help customer set up online account and Back Up Order.
  - Enroll them and help place their first order.
  - Exchange phone numbers and email addresses with them.
  - Invite them to an upcoming Melaleuca event.
  - Place them on your email list—email Welcome Letter.
  - Send personal Welcome Card.
  - Call new customer to “check in” when products arrive...  
set a date with them to go shopping in Month 2 \_\_\_\_\_.

- 2nd Month** —
- Ask how they’re enjoying the products—Favorite? Questions?
  - Share a product experience—the Vitality Pack with Oligo, Sol-U-Mel, MelaPower.
  - Inform them about monthly specials and web specials.
  - Help them shop.
  - Ask if they’d like to get their products paid for and consider referring customers.
  - Thank them and tell them you’ll check in again next month.
  - Email product and/or business stories.

- 3rd Month** —
- Thank them for being a Preferred Customer.
  - Ask how they’re enjoying the products—Favorite? Questions?
  - Ask them for a product experience.
  - Share a product experience—introduce them to a product or category they haven’t tried yet.
  - Help them shop.
  - Help them customize a Select Pack (if not already done).
  - Ask for referrals!
  - Continue emailing product and/or business stories.

- 4th Month** —
- Thank them for being a Preferred Customer.
  - Help them shop.
  - Ask if they’re comfortable doing future shopping on their own.
  - Help them put a Select Pack in place (if not already done).
  - Invite them to a larger Melaleuca event or in-home presentation.

**Month 1 Shopping**

Value Pack/  
Home Conversion Pack

Vitality 4 or 6

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Total:  
Order #:

**Month 2 Shopping**

Value Pack/  
Home Conversion Pack

Vitality 4 or 6

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Month 3 Shopping**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Month 4 Shopping**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

9 Remember, it takes at least 4 months to develop new buying habits. 0