Global
Wealth & Wellness Group

NEW BUSINESS PARTNER CHECKLIST (Revised Jan 2021)

Name _____ Phone _____

Date Enrolled _____

First Status Target Date _____

Level of Participation ____ Category 2 ___ Category 3

Month One

- ☐ Present **FULL** Overview (one-on-one/webcast/event)
- ☐ Enroll as a Preferred customer, Complete CMA
- ☐ Complete IMEA upon enrollment
- ☐ Identify Commitment Level on IMEA (Category 2 or 3)
- ☐ Shop on the spot (encourage Value/Home-Conversion pack)
  - Shop within 48 hours for $20 LSD
- ☐ Set up online account (if they enrolled via phone or ppwk)
  - Do shopping tutorial to remind of Back-Up Order, Show Learn-to-Earn & Marketplace
- ☐ Send Welcome Pack (www.RMBarry.com) or Thank You Card
- ☐ **Schedule 3-way call with your support team**
  - Gauge their commitment level
  - Answer questions
  - Schedule Strategy Session
- ☐ **Strategy Session (with your support team when possible)**
  - Welcome!
  - Importance of Three-Way Calls
  - Why?
  - 7-Critical Activities
  - Contact List
  - Identify first 5-10 contacts to approach
  - Approaches (and worksheet to practice a few)
  - Make 3 calls. Stop. Call Mentor.
  - First Goal using “Choose Your Check”
  - Getting Started with CD3, Mark Atha
  - Plugging In (trainings and Facebook groups)
  - Homework

NOTES…

- **Take Action!**

    - Sync calendars
    - Schedule 2 one-on-ones, 2 webcasts, 2 in-homes (all can be done virtually)
    - Enroll first 1,2,3 customers in first couple days
    - Keep in close contact
        - Category two very part time, interact roughly 1-2 times/week
        - Category three, more significant part-time, interact almost daily
    - Celebrate their successes!

- **Plug them in…**

    - FastTrack
    - Facebook Groups
    - Team Webcast Schedule
    - Special events

Months Two, Three, Four (and Beyond)

- Work on Organization Placement (support team can help if needed)
- Review previous month
- Remind and who how to FOLLOW UP with their new customers from previous month
- Show them Follow Up Center on Melaleuca.com
- Set Goals for the next month
- Discuss who has or is enrolling that wants to refer customers

Notes: