

- ✓ Drinking Shakeology Every Day
- ✓ Participating In Your Coach Basics Group

How to Get New Coaches Started Right

| Coach Information | | Coach Follow Up - 4 Month Plan | | | | | | | | |
|---|------------------------|--------------------------------|---|--|--|---|---|---|--|--|
| | | Order Shipped | Business Quick Start (Within 24-48 Hrs After Sign Up) | End of 1st Week | End of 2nd Week | 1 Week Before End of 1st Month | 1 Week Before End of 2nd Month | 1 Week Before End of 3rd Month | 1 Week Before End of 4th Month | Ongoing Monthly Follow Up Notes |
| 0 | Name: New Coach Name | | Talked through BQS, established why, started contact list | Has 2 people interested in Challenge Group | Started Coach Basics, on track to SC 5 | Hit SC 5! Might have one more customer by end of week | Advanced to Emerald, will earn SC 5 by end of month | Diamond by end of 4th month, shooting for SC 10, enrolled another Coach | Hit SC 10, enrolled 2 more Coaches, one PS Coach advanced to Emerald | Set up weekly call to help stay on track for Diamond |
| | Email: email@email.com | | | | | | | | | |
| | Phone: 123-123-1234 | | | | | | | | | |
| **You can add check marks when you complete each follow up step, or notes about how you followed up on your conversation to help you keep track of each unique Coach.** | | | | | | | | | | |
| 1 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 2 | Name: | | | | | | | | | |
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| | Phone: | | | | | | | | | |
| 3 | Name: | | | | | | | | | |
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| | Phone: | | | | | | | | | |
| 4 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 5 | Name: | | | | | | | | | |
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| 6 | Name: | | | | | | | | | |
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| 7 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 8 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 9 | Name: | | | | | | | | | |
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| | Phone: | | | | | | | | | |
| 10 | Name: | | | | | | | | | |
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| 11 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
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| 12 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 13 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 14 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
| | Phone: | | | | | | | | | |
| 15 | Name: | | | | | | | | | |
| | Email: | | | | | | | | | |
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