

Customer Follow Up Tracker



Be sure your Coaches are:

- ✓ Drinking Shakeology Every Day
- ✓ Participating In your Challenge Group Every Day

Helpful Links:

Shakeology FAQ

How to Follow Up with New Customers

Introducing Team Beachbody Video

Customer to Coach Guide

Customer Information		Shakeology HD Order Date	CUSTOMER FOLLOW UP - 4 MONTH PLAN								
			Order Shipped	Within 24-48 Hrs After Order Arrived	End of 1st Week	End of 2nd Week	1 Week Before 1st Shakeology HD Reorder	1 Week Before 2nd Shakeology HD Reorder	1 Week Before 3rd Shakeology HD Reorder	1 Week Before 4th Shakeology HD Reorder	Ongoing Monthly Follow Up Notes
	Name: Test Name	14th of the month	Sent Facebook message with Shake recipe and directions	Order arrived, going to try recipe tonight	Likes Shake, wants more recipes to try	Feels less tired, lost 2 lbs., sent "The Breakthrough video"	Going to switch to chocolate 24-packets	Friends are commenting on results, ask for referrals	Switch to try Strawberry, already down 15 lbs.! Joining next CG with friends	Loving Strawberry, interested in Coaching, sent "Intro TBB" Video	Signed up to be a Coach! Two of her friends did too!
	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 customer.										
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