

CUSTOMER 5-STEP INVITATION PROCESS

The Customer 5-Step Invitation Process is designed to help increase your success with inviting people to join your Beachbody Challenge® Groups. What is a Challenge Group? It's the complete solution to helping people achieve their goals and enjoy a healthy, fulfilling life. They are the most leveraged use of your time and are the most natural way to help the most people.

Challenge Groups, combined with Challenge Packs, provide members with:

- Proven fitness programs
- Dense nutrition with Shakeology
- Support and accountability from you and other members in the group
- Rewards through the Beachbody Challenge

But before you jump in to inviting people to join your Challenge Group, it's important to build relationships first. In fact, if you haven't already reviewed the [How to Build Relationships](#) document, we highly recommend you do that first, and then learn about inviting.

THE CUSTOMER 5-STEP INVITATION PROCESS: WHAT TO EXPECT

In this document you'll find sample messages and tips to help you complete each step of the process, which includes:

Step 1: Invite your prospect into the conversation.

Bridge Step 1 to Step 2: Prepare them for questions you'll be asking in Step 2.

Step 2: Interview your prospect, asking questions to learn more about them.

Bridge Step 2 to Step 3: Get a clear commitment that they will watch the video you will send them in Step 3.

Step 3: Send a video explaining more about Challenge Groups.

Step 4: Follow up to find out what they liked about the video and confirm their interest in joining your Challenge Group.

Step 5: Help your prospect enroll in your Challenge Group by walking them through the process.

Sample Messages

The sample messages are designed for you to personalize based on each unique situation. Your messages should show that you care about helping people and build trust by focusing on your prospect and their needs. The more you practice the steps in this guide to invite, the more confidence you'll build, and the less obstacles and objections you'll receive.

STEP 1: THE INVITE

Step 1 is the hook that gets your prospects into the conversation. You can send an invite to prospects one-on-one, or promote an upcoming Challenge Group openly on your social media accounts.

| Invitation Step | Sample Invitation Message | Tips |
|---|---|--|
| <p>Step 1: The Invite</p> <p><i>Start with Step 1 if you are reaching out to them first.</i></p> | <p>Hi (NAME), I don't know if this is for you or not, but I was hoping you could help me. I'm looking for five new people who want to get started losing weight over the next (21/30/60/90) days and I was wondering if you know anyone that might be interested.</p> | <ul style="list-style-type: none"> • Don't overwhelm them with too much information. • Ask if they want to hear more—don't send the second message until they say yes. |

BRIDGE: STEP 1 TO STEP 2

The Bridge in the 5 steps is like the binding on a book. Without the bridge, you have five separate steps that don't flow well, but with it they all connect. The Bridge makes it easy to lead your prospect down the right path and help them make a better-informed choice. Learning to bridge each step makes it easier and keeps you in control.

| Invitation Step | Sample Invitation Message | Tips |
|--|--|--|
| <p>Bridge Step 1 to Step 2: Prepare Prospects for Questions</p> | <p><u>Option 1: If they ask about price first:</u> That depends on what you want and need. How about I ask you a few questions and we can go from there to make sure this is right for you.</p> <p><u>Option 2: If they are interested and want more information:</u> Great, I'm glad you're interested. Let me ask you a few questions and we can go from there to make sure this is right for you.</p> | <ul style="list-style-type: none"> • Never skip the Bridge. It sets up Step 2 and prepares your prospect for the questions you're going to ask. |

STEP 2: THE INTERVIEW

In Step 2 you'll ask your prospect a few simple questions to help you learn more about them. Asking questions about fitness, nutrition, and support/accountability will help you better understand where the prospect is, what they are doing well or not well, and what they need.

| Invitation Step | Sample Questions | Tips |
|---|---|---|
| <p>Step 2: The Interview</p> <p><i>Start with Step 2 if they reach out to you first.</i></p> | <p><u>Questions:</u></p> <p>What made you interested in this (insert fitness program if they responded to a specific program you mentioned)?</p> <p>How long have you struggled with nutrition?</p> <p>How many times in the last 5 years would you say you've tried to lose weight but gave up before you reached your goal?</p> <p>Have you ever tried a Beachbody program before?</p> <p>Do you know anyone who would want to work out and eat healthy with you?</p> <p>Do you think you would benefit from being a part of a group that's sharing and helping each other through the program?</p> <p>What do you do for exercise?</p> | <ul style="list-style-type: none"> • Slow down and ask questions—if you hear "on-the-surface" answers, ask more questions. • Go back and forth as many times as you need to truly understand their emotional needs. • Use Step 2 at all times. This is the most vital step in relationship building. |

BRIDGE: STEP 2 TO STEP 3

Bridging to Step 3 is simply when you use the "If I...would you..." approach to get a clear commitment from your prospect that they will watch the video you will send them in Step 3. It is also when you confirm when they plan to watch it and schedule the Step 4 Follow Up.

| Invitation Step | Sample Invitation Message | Tips |
|---|--|--|
| Bridge Step 2 to Step 3: "If I...would you..." | <p>Listen, I still don't know if this is right for you, but it sounds like it is. When I'm asking these questions it's to help me listen and to know if this is something that's right for you and will help you in your life. So, just to make sure this is something you're willing to invest in, if I show you videos that tell you more about our Challenge Groups, would you have 4 minutes to watch them?</p> <p>What time in the next 24 hours are you available so I can follow up and see what you thought?</p> | <ul style="list-style-type: none"> • Schedule the watch and the follow-up as soon as possible, ideally within 24 hours. |

STEP 3: SEND VIDEOS

It's important to send the video(s) to your prospect immediately following your Bridge Step 2 to Step 3 conversation. Two great videos to send are the "Ever Feel Like This?" video and the "Customer Success Stories – Beachbody Challenge Groups" video. They do a great job of explaining how Challenge Groups work and the many benefits members receive. If you're inviting to a Beachbody Ultimate Reset Challenge Group we also recommend sending the "Every Body Needs A Tune-Up."

| Invitation Step | Sample Invitation Message | Tips |
|---|--|---|
| Step 3: Send Videos <i>If they want more information, or if they offer some type of objection, show them the video. Let the video do the talking and explain Challenge Groups to make sure it's right for them.</i> | <p>Great, so you can watch this tonight at (TIME). Go ahead and watch the video(s) and I will follow up with you first thing in the morning to see what you thought about it. Sound good?</p> <p><Insert Video(s)></p> | <ul style="list-style-type: none"> • Always repeat back the time they committed to watching the video(s) and the follow-up time. • Share videos from the Coach Online Office Video Library in the Beachbody Challenge <u>and/or</u> Products > Ultimate Reset playlists. • Never argue facts. If they have an objection, simply share the videos, or refer to How to Overcome Objections. |

STEP 4: FOLLOW UP & CONFIRM INTEREST

When talking to your prospect during your scheduled follow-up meeting, find out what they liked about the videos, which will give them a chance to reflect on what they saw. When you hear them saying positive things about what they learned about Challenge Groups, then it's time to explain the Challenge Pack deal and ask them to enroll.

| Invitation Step | Sample Invitation Message | Tips |
|--|---|---|
| <p>Step 4: Follow Up and Confirm Interest</p> | <p>Hi (NAME), did you have a chance to watch the video?</p> <p><u>Sample Questions: Find out if they are ready to join your Challenge Group.</u></p> <ul style="list-style-type: none"> • What did you like about the video? • Did you come to a better understanding of how our Challenge Groups work? • Did you see how Challenge Groups could help answer your questions about fitness, nutrition, and accountability? • So does this look like something you're willing to invest in? <p><u>Explain the Deal</u></p> <p>Hi (NAME), it sounds like this is something you are ready to do. So here's how it works: You enroll with a Challenge Pack, which comes complete with a fitness program, the complete fitness and nutrition guide, your first month of Shakeology, and the accountability of me as your Coach and our entire Group. You get all of that for an initial investment of (CHALLENGE PACK COST). After your initial investment, you'll just have the investment of Shakeology® each month. How would you like to cover that, with a credit or debit card?</p> | <ul style="list-style-type: none"> • You want them to succeed, so set the expectations now. • Ask questions to make sure they understand how Challenge Groups work and to clarify anything they are unsure of. • Always ask if they are ready and how they want to cover their investment. • Make sure they understand the monthly Shakeology HD investment so they are prepared for the charge in their month two. |

STEP 5: HELP THEM ENROLL

Once your prospect confirms they are ready to join your Group, walk them through the enrollment process to make sure it's completed successfully, and with the right products.

| Invitation Step | Sample Invitation Message | Tips |
|---------------------------------|--|--|
| Step 5: Help Them Enroll | Great, why don't we get you started? It only takes about 10 minutes. Are you by your computer? | <ul style="list-style-type: none"> • Use the Coach Mobile App, or go to your Team Beachbody® Coach website without being logged in so you can walk through the steps with them and see what they see. • The Showcase Challenge Pack is a great option for new Coaches. They'll get three fitness programs, Shakeology HD, Coach tools, and more. |

ENROLLMENT STEPS

| Enrollment Method | Step-by-Step Process |
|---|--|
| Enroll customer with the Coach Mobile App | <ol style="list-style-type: none"> 1. Enter their email address. 2. Select "Enroll New Customer." 3. Enter their first and last name and phone number. 4. Click "Shop Now." 5. Select the program and Shakeology flavor your customer chooses. 6. Click "Add to cart." 7. Review order then hit "Submit." |
| Enroll customer online with a Challenge Pack | <ol style="list-style-type: none"> 1. Go to http://www.BeachbodyCoach.com/yourscreenname 2. Click "Shop." 3. Click the "Challenge Packs" link in the left nav. 4. Choose your Challenge Pack. 5. Check out and verify their order is complete. |
| Enroll a customer online as a Shakeology HD customer if the customer already owns a fitness program | <ol style="list-style-type: none"> 1. Go to http://www.BeachbodyCoach.com/screenname (put in YOUR website). 2. Click "Shop." 3. Choose "Shakeology" and order the HD bag/packets of their choice. 4. Check out and verify their order is complete. |

NEXT STEPS

Follow the steps in [How to Follow Up with Customers](#) to help get them on the path to success right away. Make sure to add them to your [Customer Follow-Up Tracker](#) and check in often, always providing motivation and tips to keep them headed toward achieving their goals.

SITUATION SCRIPTS

Didn't anticipate you'd forget a step, or that your prospect wouldn't respond? No worries, nobody's perfect, which is why we created scripts for situations like these to get you back on track. Remember to modify the language to fit your personal style.

| Situation | Sample Message |
|---|---|
| My prospect didn't respond to Step 1 or Step 2. | Hi (NAME), did you get my message about my Beachbody Challenge Group? I already have people moving forward and wanted to make sure I didn't miss you by accident. Would you rather I come back around to you for the next Challenge Group, or did you want to hear more about this Group? |
| I messed up and didn't use Step 2 and failed to get my prospects needs and wants. | Hey (NAME), I need to apologize; I sent you the video before I had a chance to ask you a few questions to make sure this is right for you. The more I understand why you're interested, the better I can help you get connected to a solution that's right for you. |
| My prospect didn't respond to Step 3. | Wait 48 hours, then say: Hi (NAME), I'm not sure where we left off. I already have people who have joined my Group and are moving forward and just want to make sure I didn't leave you out by accident. If I show you videos that tell you more about our Challenge Groups, would you have 4 minutes to watch them? |
| My Prospect didn't respond to Step 4 or Step 5. | Hi (NAME), I'm not sure where we left off. I already have people who have joined my Group and are moving forward and just want to make sure I didn't leave you out by accident. I know you wanted to (REPEAT THEIR NEEDS/WANTS/GOALS FROM STEP 2). Did you want me to go ahead and fill this spot with someone else and move you to the next Challenge Group, or were you ready to get started now? |

Review the training on [How to Overcome Objections](#) for sample messages and tips on how to help prospects overcome their objections and connect to a Beachbody solution to help them achieve their goals.