

Getting a New WA Started Checklist

The following checklist is designed with the new Wellness Advocate in mind. This will help you make sure you are getting your new members all the vital information they need to get off to a great start with dōTERRA!

MAKE SURE ALL NEW WA'S GET (THESE ITEMS DO NOT COME IN THEIR PACKET)

- Modern Essentials book (available at a discount through your enroller)
- Living Magazine (from Class in a Box)
- Resources and Connections page (*created by Susie Larson.)
- A copy* of this form or your own version of it.

IMPORTANT TO DO ITEMS WITH ALL NEW MEMBERS

- FOLLOW UP! Schedule a follow up appointment/ Membership Overview/ Getting started training to teach them about the back office and LRP; go over invite list; provide samples to start sharing.
- Send all new WA's a Welcome email from YOUR email address. This is more personal, and has their WA# as well as password that you created. (*created by Susie Larson, feel free to change it to make it your own)
- Plug them into Share Success Pro App: Customer/ LIVE for product learning texts and emails.
- Invite them to the next event occurring and invite them to bring guests.
- Invite them to make a list of 50-100 and host their own event. Even those not sure they want to earn can host! See your enroller for ideas on how to set up host gifting.

Ask: "Are you open to creating some additional income for yourself?" If they say yes, add this:

- Schedule and complete a Business Overview.
- Help them start learning at dōTERRA University (at dōTERRA.com) - paying special attention to the Product Claims and Compliance information under the Building Section.
- Plug them into Share Success Pro App: BUILD for learning texts and emails
- Advise them to read Making the First Circle Work by Randy Gage
- Schedule their Launch week: 4 classes in ONE week (6 Weeks to Elite plan)
- Help provide them with samples and host gifts, so they can take action now.
- Help them get Direct Deposit set up.

*This form, and all the above mentioned items are available for download on either the Team Jonti Facebook page under files, or at www.jontioils.com on the Wellness Advocates page.