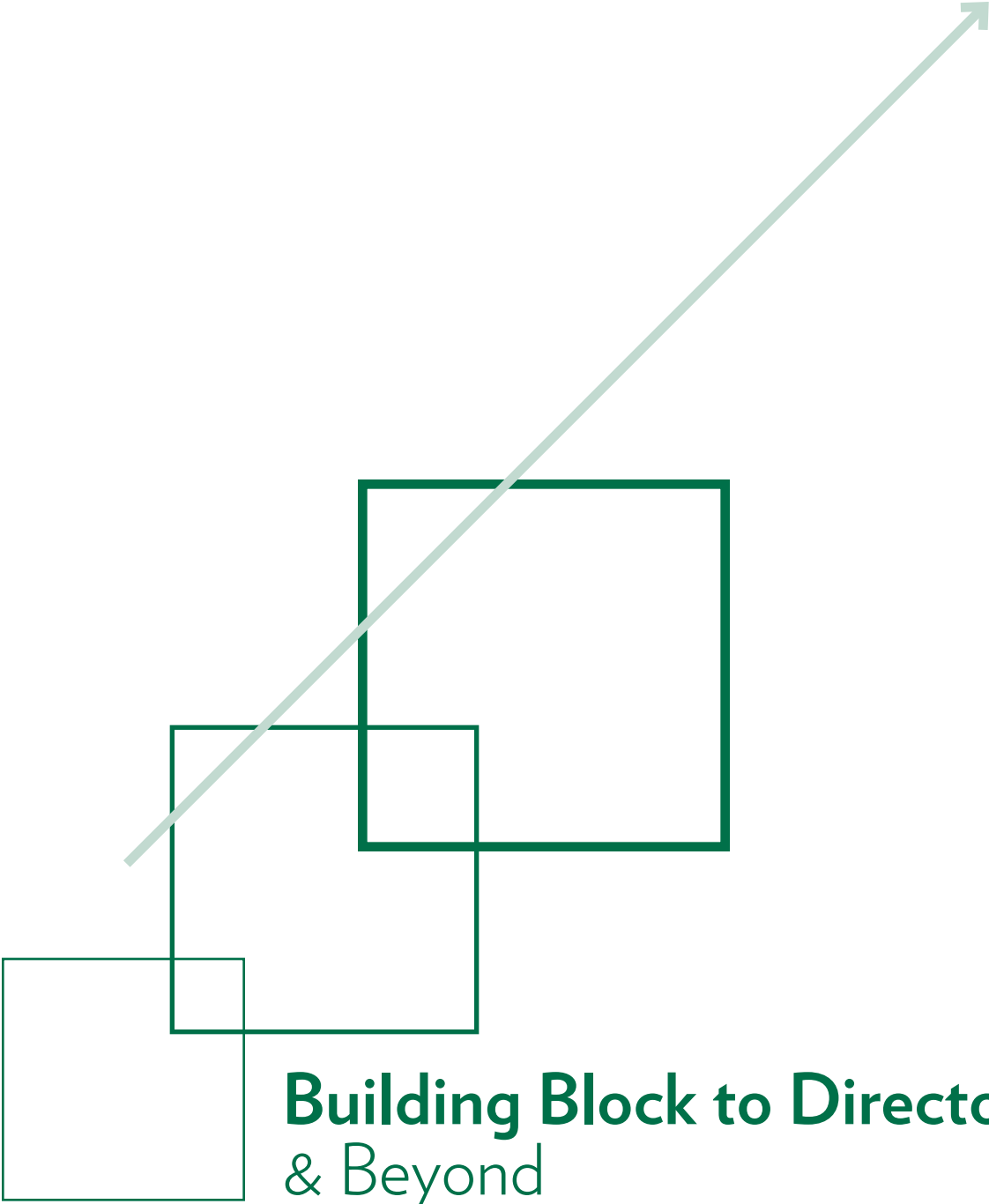


**MONTHLY PV PLANNING**

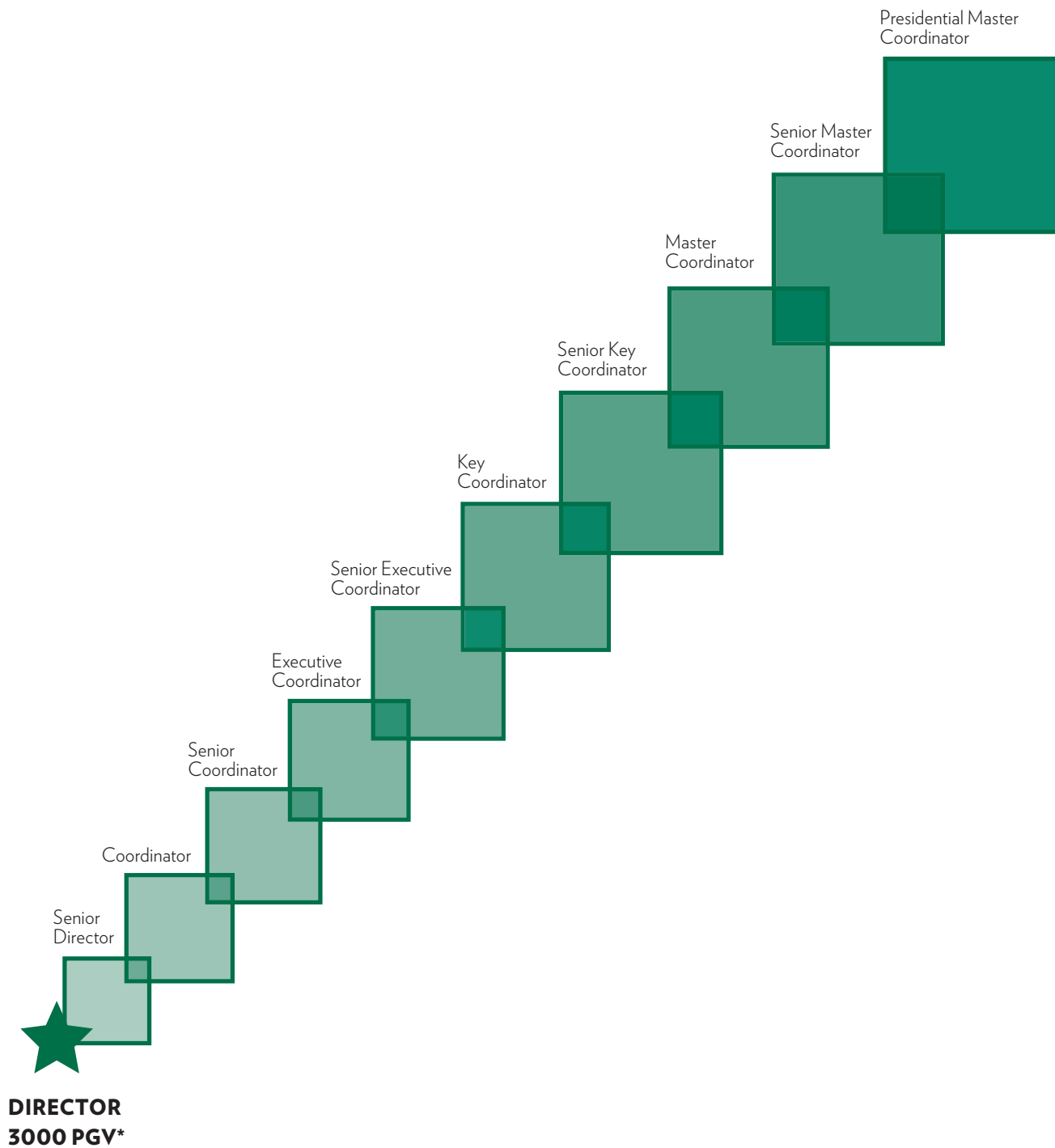
# Workbook



**Building Block to Director  
& Beyond**

# Master Coordinator Starts with You...

## Building from Director



\*2000 PGV is required for Director. 3000 PGV is recommended to build a solid organization and qualify for New Director's Conference.

# Building Block to Director & Beyond

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Building a Shaklee organization starts by first becoming a Director. When you build a solid Directorship, you start to build an organization that will be strong for years to come.

Next is duplicating yourself. By learning how to share Shaklee, you can then teach others to do the same. Find Business Builders and invest time to teach them, to develop a team.

The more you coach and develop Leaders on your team, the stronger your future. Remember to be patient. Stay focused on your future growth as it all starts with a solid foundation!

Included in this workbook are planning tools for you to reference as you approach each month, to plan activities to achieve your PGV Goals. We have interviewed Field Leaders, conducted pilot tests for feedback and now provide you with best practices for becoming a strong Shaklee Director and teaching others to do the same.

Wishing you Shaklee Success as you start your Leadership journey.

Elena Panos

Vice President, Training

# MONTHLY PV PLAN

## SCRIPT:

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As you work towards Director or coach others to Director, use this script to create a monthly plan of activities to achieve 3000 Personal Group Volume (PGV).

### SCRIPT

Now that you've set your goal on Director, I'd like to show you how to make a plan to generate the PV requirement for Director Level.

Even though the minimum requirement in our Dream Plan is 2000, we recommend you set a goal of 3000 PGV in order to build a solid foundation for your future. The additional benefit of achieving 3000 PGV is it helps qualify you for a Car Bonus and the New Directors Conference at our home office in Pleasanton, CA.

So let me show you how this works. I invite you to grab some paper and follow along. We're going to do a little math. Everybody ready? Here we go.

**FIRST**, let's write down

#### PERSONAL USE

Write down 100 PV/month, this is the minimum monthly requirement to earn bonuses.

Shaklee develops and produces remarkable products and all of them are based on a philosophy of Living in Harmony with Nature®. They are made from ingredients that are safe, that work, and are supported by scientific research.

When I discovered Shaklee products, I gradually replaced every product in my home for which there was a safer, more natural Shaklee equivalent.

**100 PV** for personal use is very conservative, but let's stay with that.

100 down and 1900 to go.

### NEXT

#### IN-HOME EVENTS AND FACEBOOK® EVENTS

are effective ways to build your business. They feature interesting topics such as *How to Help Our Kids Have Their Best Year Ever*, *Healthy Home-Healthy You*, *I'm Dreaming of a Light Christmas Weight Loss Event*, etc.

These events with follow ups can generate about 250 PV each.

So 250 PV X 4 weeks in the month = **1000 PV!**

Now we're getting somewhere.  
900 to go - Is Everybody tracking?

Next, one of our favorite activities is a conference call or web event that we call Health Chats.

#### HEALTH CHATS

A Health Chat is approximately 30 minutes on a topic of particular interest. This topic should be of interest to people you know, so they will want to attend e.g., Stress, Energy, (i.e., Everything you wanted to Know About Energy... but Were too Tired to Ask - and other fun sounding topics)

Here's the best part, you don't need to be an expert. Ask for testimonials and select speakers who have dealt with a particular health issue - maybe a digestive issue, or immune system issue, or who have children with issues that would benefit from sound nutrition, etc.

And they simply share their story.

# MONTHLY PV PLAN

## SCRIPT:

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### HEALTH CHATS (CON'T)

Even our newest Distributors find it very comfortable to invite people to these events because they are short, the Distributors provide great information and explain the Shaklee Difference, and guests don't feel pressured to by anything

After they hear the information, follow up with them. Typically you will get an order of 50 to 100 PV depending on their budget.

So if you invited 3 people a week:

3 people X 100 PV = 300 PV X 4 weeks in the month = 1200 PV and you fly right over that 2000 PGV.

900 + 1200 = **2100**

Now let's start heading to 3000 PGV and qualification for the New Directors Conference.

### INDIVIDUAL APPOINTMENTS— "Reach Outs"

#### 3-WAY CALLS

(Healthprint consultations, Product Presentations, Business Presentations, etc.)

Appointments typically result in about 100 PV

If you conducted 4 / month at 100 PV = **400 PV** or more

These are only a few reach-out methods using product and health topics to generate interest.

### THE BUSINESS OPPORTUNITY

New Members can also have an interest in earning income. Always review and recap with 3 ways to join Shaklee:

#### USE:

Use the remarkable products and become lifelong customers.

#### SHARE:

Once you experience the benefits of Shaklee products, you will think of others you want to share Shaklee with and as a result you can earn enough to cover the cost of your products.

#### BUILD:

You can build a substantial business and earn a career-level income.\*

So now you have a system by which you can continually meet new people, some will become lifelong Customers and some will become business builders.

You are now on your way to qualify for the New Directors Conference!

Keep it up -

#### BUILD IN DEPTH

by coaching your Directors. Before you know it, you lead a team of Business Leaders and are advancing toward the rank of Coordinator and beyond.

You have joined a community of Business Leaders dedicated to Providing a healthier life for everyone and a better life for anyone®.

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\* Visit Myshaklee.com for current average annual incomes by rank.

# PV REFERENCE SHEET:

## ACTIVITIES TO GENERATE PV

### USE: SHAKLEE PRODUCTS

100 PV	Personal Use	The minimum monthly amount required to qualify for bonuses. Shakleeize your home to become familiar with Shaklee products, use the products yourself, and experience the benefits. Monthly AutoShip is recommended.
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### SHARE: SHAKLEE PRODUCTS

#### IN-PERSON:

100 PV	Appointment to learn about the products	Meetings with new people to share the benefits of Shaklee products. Ask questions to learn their needs. Suggest products based on what you have learned. Review the Shaklee Product Guide.
250-500 PV	Appointment to learn about the business	Schedule meetings to share the business opportunity. Review the earning opportunity and share the value of the Gold PAKs.
100 PV	3-Way Call	A prospect is invited to a scheduled call with your Upline to explore options and learn about the product benefits and Business Opportunity. Start the call by introducing your Upline, highlight their experience and ability to answer any questions.

#### EVENTS:

250 PV	In-Home Event	Host an in-home meeting for a smaller group to review Shaklee products. This event can be a themed party.
250 PV	Business Launch Event	Kick off a new business with a launch event. Invite guests to your business opening so they can learn about Shaklee Healthy Nutrition and the Business Opportunity of Use, Share and Build. For those who cannot logistically attend, consider a virtual business launch event.
250 PV	Trade Show	Host a Shaklee branded booth/table at a wellness fair or industry event to meet prospects.
250 PV	Shaklee 180 <sup>®</sup> Tasting	This is a Shaklee 180 event for those interested in learning more about achieving and maintaining a healthy weight. At this event include samples of Smoothies, Meal Bars, and Snack Bars.
250 PV	Smoothie Workshop	A fun smoothie event you can host at your home or a friend's or Distributor's home. Expand your reach and meet new people, as others, in turn, host their own events and invite their friends. You provide the fresh ingredients and recipes for each person to prepare 7 meals, the workshop cost should cover your food costs. Your guests can come with a cooler and zip lock bags to bring home the Smoothie combinations.

#### HEALTH CONSULTATIONS:

300 PV	Health Chat	A 30-minute conference call for prospects. Select a topic and invite people who expressed interest in learning more. Share testimonials, health tips, and talk about the different ways Shaklee products can help. (e.g., smart choices for today's women, healthy happy heart, helping children have their best year ever.)
★ 300 PV	Healthprint™	Help people reach their health goals with Shaklee Healthprint™ – our new digital assessment tool. Use Healthprint™ to engage in informed conversations with your prospects and Members, armed with insights that allow you to provide a personalized roadmap to wellness.

### BUILD: FOLLOW UP & SERVICE

200 PV	Prospect Follow-Up	Follow up with prospects to check in on their interest level. Ask for permission to keep in touch. Share exciting updates and news to develop a relationship.
200 PV	Member Follow-Up	Schedule time to touch base with existing Members and customers to provide service, answer questions, and introduce new products.
200 PV	New Member Orientation	Arrange a follow-up appointment with a new Member to review progress (results) and introduce other product categories. Review the earning opportunity and ask for referrals.

# PV REFERENCE SHEET:

## ACTIVITIES TO GENERATE PV

### SOCIAL

100 PV	Social Post	Post photos on Facebook® or Instagram® to share your enthusiasm about a new experience, product benefit, or lifestyle. Share “Before” and “After” photos and stories, e.g., weight loss, difference in skin, or before/after cleaning results in your home, as a great way to attract interest.
200 PV	Facebook Event	A Facebook event is a great way to engage a large number of people at once, and to reach those who you may not be able to meet in person. It is a themed series of posts that include photos chronicling a designated period. To create additional excitement, you may offer a special incentive to participate in the event. Monitor comments and reply to private messages you receive. Guests can join in and comment at any time.
200-300 PV	Texting Blitz	A great way to create new relationships. Get together with your team and make a list of 10 people, then write beside each name why you thought of them. As a group discuss each name, create a text, offer feedback, and send. This provides an ideal environment to ask questions, and the group can discuss how to respond to texts that come in as a result of the blitz. 90% of text messages are read within 3 minutes. Examples: “Hi was just thinking of you, would like to invite you to an event that I know you’ll enjoy.” “Hi I just came back from our Global Conference and would love to share with you what I learned.” “Hi we just launched a new Healthprint™ assessment and would like to send you a link for your feedback.” Keep it short and simple, keep it real, and keep it going!

### FITNESS STUDIOS

500 PV	Shaklee Integrated Wellness Studio Visit	Meet with studio owners to discuss the opportunity to earn additional income. Host a product sampling demonstration and/or talk at a studio with studio staff or member, share the value of the Gold Plus Studio PAK.
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### OTHER GREAT SUGGESTIONS

200 PV	Gift Fulfillment Program	The Gift Fulfillment Program is an ideal way to provide a free product as a gift for participating in a promotion. Gift recipient redeems their gift with their next order. (Available in U.S. only)
200 PV	Incentives	Offer a product promotion or 10% discount with a 100 PV order, etc., or contact new customers and share the current company specials if applicable.

### PRODUCTS TO BUILD VOLUME

750 PV	Super Gold PAK	Recruit business builders: Purchase of a Gold PAK offers a new Distributor a selection of the most popular Shaklee products plus business materials and a flash drive with tools to get them started.
500 PV	Gold Plus PAK	
500 PV	Gold Plus Studio PAK	
250 PV	Gold PAK	
150 PV	Shaklee Life Plan	Recruit Members and customers: Introduce new customers to Shaklee with the purchase of a Life Plan and receive free Membership.
100 PV	Shaklee Vitalizing Plan	
50 PV	Shaklee Essentials Plan	

# MONTHLY PV PLAN:

LIST ACTIVITY	WEEKLY	MONTHLY	PV

### ACTIVITIES TO CHOOSE FROM TO GENERATE PV

**APPROXIMATE PV**

	USE
100	Personal Use
100	Family & Friends
<b>SHARE</b>	
100	Appointment to learn about the products
500	Appointment to learn about the business
100	3-Way Call
250	In-Home Event
250	Business Launch Event
250	Trade Show
250	Shaklee 180 Tastings
250	Smoothie Workshops
300	Health Chat
300	Healthprint™
<b>BUILD</b>	
200	Prospect Follow Up
200	Member Follow Up
200	New Member Orientation
<b>SOCIAL</b>	
100	Social Post
200	Facebook Event
300	Texting Blitz
<b>FITNESS STUDIOS</b>	
500	Shaklee Integrated Wellness Studio Visit
<b>MISC</b>	
200	Gift Fulfillment Program
200	Incentives
<b>PRODUCTS TO CREATE VOLUME</b>	
750	Super Gold PAK
500	Gold Plus PAK
500	Gold Plus Studio PAK
250	Gold PAK
150	Shaklee Life Plan
100	Shaklee Vitalizing Plan
50	Shaklee Essentials Plan









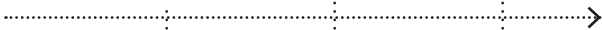
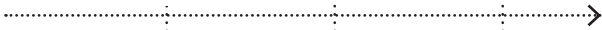


**POST CONFERENCE CALENDAR:**

# 100 DAYS AFTER SHAKLEE LIVE

## Action Plan—Monthly Activities

PV/PGV Monthly Goal

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Target
<b>AUGUST</b>		1	2	3	4	5	6	# Reach Outs
				 <b>SHAKLEE LIVE!</b> <b>AUGUST 3-7, 2016</b>				# Follow Up
	7	8	9	10	11	12	13	# Reach Outs
		<b>VIDEO CONFERENCE "POST SHAKLEE LIVE"</b>						# Follow Up
	14	15	16	17	18	19	20	# Reach Outs
				<b>VIDEO CONFERENCE "SHAKLEE INNOVATION UPDATES"</b>			<b>LIVE BROADCAST EVENT "SUCCESS STARTS WITH YOU" GUESTS INVITED</b>	# Follow Up
	21	22	23	24	25	26	27	# Reach Outs
		Post Conference Meetings						# Follow Up
								
	28	29	30	31				# Reach Outs
		Post Conference Meetings						# Follow Up
								

Results:

**POST CONFERENCE CALENDAR:**

# 100 DAYS AFTER SHAKLEE LIVE

## Action Plan—Monthly Activities

PV/PGV Monthly Goal

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Target
<b>SEPTEMBER</b>					1	2	3	# Reach Outs
								# Follow Up
	4	5	6	7	8	9	10	# Reach Outs
	Post Conference Meetings		<b>30 DAYS AFTER SHAKLEE LIVE</b>	<b>VIDEO CONFERENCE NORTH AMERICA LEADERSHIP</b>				# Follow Up
	11	12	13	14	15	16	17	# Reach Outs
	Post Conference Meetings							# Follow Up
	18	19	20	21	22	23	24	# Reach Outs
	Post Conference Meetings				<b>NEW DIRECTORS CONFERENCE SEPT 21-24, 2016</b>			# Follow Up
	25	26	27	28	29	30		# Reach Outs
	Post Conference Meetings							# Follow Up

Results:

**POST CONFERENCE CALENDAR:**

# 100 DAYS AFTER SHAKLEE LIVE

## Action Plan—Monthly Activities

PV/PGV Monthly Goal

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Target
								1
<b>OCTOBER</b>	2	3	4	5	6	7	8	# Reach Outs # Follow Up
	Post Conference Meetings →			VIDEO CONFERENCE "NORTH AMERICA LEADERSHIP"	60 DAYS AFTER SHAKLEE LIVE			
	9	10	11	12	13	14	15	# Reach Outs # Follow Up
	Post Conference Meetings →		CANADIAN THANKSGIVING					
	16	17	18	19	20	21	22	# Reach Outs # Follow Up
Post Conference Meetings →								
23	24	25	26	27	28	29	# Reach Outs # Follow Up	
Post Conference Meetings →								
	30	31						

Results:

**POST CONFERENCE CALENDAR:**

# 100 DAYS AFTER SHAKLEE LIVE

## Action Plan—Monthly Activities

PV/PGV Monthly Goal

**NOVEMBER**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Weekly Target
		1	2 VIDEO CONFERENCE "NORTH AMERICA LEADERSHIP"	3	4	5 90 DAYS AFTER SHAKLEE LIVE	# Reach Outs # Follow Up
6	7	8	9	10	11	12	# Reach Outs # Follow Up
Post Conference Meetings →							
13	14 HEALTHPRINT™ CHALLENGE END DATE 100 DAYS AFTER SHAKLEE LIVE	15	16	17	18	19	# Reach Outs # Follow Up
Post Conference Meetings →							
20	21	22	23	24 THANKSGIVING	25	26	# Reach Outs # Follow Up
Post Conference Meetings →							
27	28	29	30				# Reach Outs # Follow Up
FIELD EVENTS <b>SUPER SATURDAY</b>	CYBER MONDAY						
					BLACK FRIDAY		

Results:









“Expect to win.  
The expectation will set a pattern for your accomplishment.”

~ Dr. Forrest C. Shaklee

**Are you following Shaklee on social media?**

**Like and follow our social communities to get the most out of your Shaklee experience!**

    /SHAKLEEHQ