

Follow Up Plan

CUSTOMER:

SIGN UP DATE:

MEMBER ID:

WHY THEY JOINED YL

ONBOARDING:

- Send welcome information (email, text, packet)
- Plug in to resources
- Show how to navigate website + place next order
- Start 90 day wellness plan
- Set up next follow up meeting

RESOURCES SHARED:

FOLLOW UP:

- set up onboarding meeting
- 2 week check in
- 1 month check in - assess needs + help place next order. Talk about subscription.
- 2 month check in
- 3 month check in - evaluate 90 day wellness plan
- 4 month check in
- 5 month check in
- 6 month check in - revisit subscription/ wellness plan as needed.
- 9 month check in
- 11 month check in - remind about 100pv yearly requirement to maintain 24% discount (if needed)
- 12 month check in- Happy Oilaversary!
- add to long term follow up plan

NOTES :
