

Wellness Evaluation Notes

Checklist

Business Cards
Notebook and pens
Daily Diet Sheets
Wellness and Herbalife “Key to Wellness” booklets
Product Brochure
Lean Protein Estimator/Omron Body Fat Tester
Digital Scales
Price List
Receipt pad and calculator
Protein Bars & Soybeans (for Thank You gift)

Optional:

Nutrition products in car boot
Support Pack (Costs £5 and contains: shaker, small tablet box, spoon, tape measure, 30 Day Tracker)

Evaluation

Explain you will be going through the booklets together and you'll be leaving them with them when you leave.

Don't forget to put your stickers on booklets and product brochure

Fill out their Daily Diet Sheet.

Do not make any recommendations.

Ask them what they understand by Wellness

What is their present state of Wellness?

What would they like to achieve from this Evaluation?

Make notes

Read through the booklet with them highlighting main/relevant points.

Exercise (P.14): Ask them what exercise they do. *Make notes*

Fill out Questionnaire

Fill out their personal details and health and wellness goals.

Work out their BMI, *Show them where they are on BMI chart and mark with cross*

Go through Wellness Questions and work out their score.

Tick “Answers” which were “No” and go through summaries for these. *Do not make any product recommendations*

Ask them to evaluate the service you've provided on sheet.

Ask for referrals

Remind them they agreed to give you some names

Take white copy of Evaluation Sheet

Wellness Presentation Book

Go through book with them.

P.3 Herbalife Distributor: Tell them your product story so far and show them your Before photo if you have one.

Write down areas needing improvement on Daily Diet Sheet.

Product Brochure

Recommend basic and targeted products they need based on their Daily Diet sheet and “No” answers in their questionnaire

Write recommended products at bottom of their questionnaire.

Based on the recommendations they've received, do they think they would like to make any changes in their diet and lifestyle?

If Yes: Would they be interested in any of the products I recommended to help them do this?

Ask for the sale

If undecided, remember to follow them up in a few days time to run through any questions etc

Leave them protein bar or soybean as Thank You gift

Discuss follow up and ongoing support

Book a follow up appointment to visit them again in 4 weeks' time (optional)

Don't forget to take white and blue copies of questionnaire!

Wellness Questionnaire

Recommended products for appropriate questions:

- 1: Formula 1 and Protein Powder good source of protein
P9 & 16
- 2: Formula 2, RoseOx **P13 & 33**
- 3: Florafibre, Fibrebond **P35 & 21**
- 4: Herbalifeline **P32**
- 5: Fibrebond **P21**
- 6: Indigestion: Herbal Aloe Concentrate **P18**
Irregularity: Fibrebond **P21**
- 7: N/A
- 9: Formula 1 **P9**
- 10: Thermojetic Beverage, LiftOff (recommend one) **P19 & 28**
Thermo Complete **P20**
Protein Bars and Roasted Soybeans **P17**
- 11: Herbal Complex **P19**
- 12: NRG, LiftOff (recommend one) **P29 & 28**
- 13: Thermojetic Beverage, Herbal Aloe Concentrate **P19 & 18**
- 14: Xtra-Cal **P 34**

WELLNESS EVALUATION

Name: _____

Date: _____

Your Typical Daily Diet

	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Evening
Usual Time						
What I eat						
What I drink						

Recommendations for areas needing improvement: