

Prospect Tracker

RATE YOUR PROSPECTS:

- 1 Have unmet health or wealth needs
- 2 Open to trying new things
- 3 Into using natural solutions

Start contacting those who have all three.

As you brainstorm those you want to share with, make note of their needs to guide your approach and what to share. Check applicable boxes to pre-qualify and focus efforts. Rate the quality of your prospects. Most of your contacts will be your own. As you receive referrals, make note of who referred them to you.

PREQUALIFY/ASK:
"Have you had experience with...?"

Natural Health	Essential Oils	doTERRA				Share Experience	Invite	Remind 48 hr./4 hr.	Attend 1st Class	Enrolled	Scheduled/ Held Lifestyle Overview
			<ul style="list-style-type: none"> • Needs: interests, health priorities, money, etc. • What to share: products, story, video/webinar, research study, websites, etc. • How to contact: in person, social media, phone, 3-way call, mail, text • How to share: class, one-on-one, lunch appointment, get together, etc. 								
			Name:			Phone:					
Date:			Email:			Address:					
Referred By:			Needs:								
			What to share:								
			How to contact:								
Rate:			How to share:								
<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3			Notes:								
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Rate:	<i>How to share:</i>										
① ② ③	<i>Notes:</i>										
			<i>Name:</i>	<i>Phone:</i>							
Date:	<i>Email:</i>		<i>Address:</i>								
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Date:	<i>Email:</i>		<i>Address:</i>								
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