

# 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:**