

# How to do a Wellness Consult

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## **Wellness Consult Form** (Empowered Success Live Guide)

Now that you have enrolled your first people you need to learn how to do a wellness consult with them. Below you will find the wellness consult form. You will use this when going through the wellness consult. This is a great place for your new enrollment to take notes and stay organized.

**Bonus Tip:** It is recommended you don't use the term "Wellness Consult" with your new enrollment...after all before you were doing this business did you know what a Wellness Consult was?

Instead of trying to name it something, simply explain to your enrollment what you will be doing in this meeting, see below script for a great example.

## **Booking Wellness Consult Script**

*This should preferably be set up at the time of enrollment, or if that does not happen and you are calling to book the appointment, use this when they answer, 'Did I catch you at a bad time?' People automatically answer no, so that is why we word it that way.*

Now that you ordered/have your first order in we need to set up a time to quickly go through your health challenges and how to use your essential oils as well as how you can order on your own and how you can get the best discounts when you do order. My part will take about 30 minutes. How does that sound?

We can do it over the phone or in person. Which do you think would be better for you?

Great, I typically do \_\_\_\_\_ appointments like this per week. We can do \_\_\_\_\_ or \_\_\_\_\_. Which works better for your schedule?

# Wellness Consult Script

(Also called "Lifestyle Overview")

## Supplies needed for Wellness Consult (Lifestyle Overview)

- \_\_\_\_\_ **Pen**
- \_\_\_\_\_ **Oil Usage Guide**
- \_\_\_\_\_ **Computer** (if possible to go over account)

## Agenda

I'm going to be reading off my script to make sure I don't go on any tangents.

Today we are going to review your goals, make a list of products you have and may want in the future, then I'll show you how to order so you can save the most money. A lot of people make mistakes here and I don't want you to miss out.

Then I'll explain how the business side works, because most people want to know, even just out of curiosity. My part will take about 30 minutes. Is there anything else you would like to go over today?  
*Hand out the Wellness Consult form.*

## Learn about their goals

I think I remember some of your goals, but I don't want to miss anything. Can you remind me of your health goals just so we are on the same page?

*Have them write these down on their Wellness Consult form and allow them to elaborate now that they like and trust you.*

*If your customers are having trouble with their health and wellness goals now its time to jog their memory, let them know some of the amazing things dōTERRA has.  
Pick 2-3 that you think the person might be interested in.*

A lot of my customers have... Do any of these apply to you as well?

Weight loss goals • Want natural cleaning products • All natural skin care and/personal care  
Help with sleep • Gut cleanse • Energy Issues • Aches & Pains

Ok, let's jot those down and I can help you with what oils you would use for them.

## Their Health Goals

Let me grab my oil usage guide, I don't want to forget anything that will really help you.

We are going to make a list that you will be able to keep this for reference and add to it over time. To help you feel empowered, I want to show you how you can look up each ailment that comes up and find solutions quickly, as well as take some notes on the most common challenges in your home. You may want to get a resource guide like this guide book or app to help you as stuff comes up.

Go ahead and write your health goals on this wellness consult form.

*Go through their health goals, what products they have and what they might want in the future and explain all the products that meet their goals/wants.*

## **Healthy Lifestyle Plan**

Now that we have mapped out your health goals and what products will help you lets take a moment to create a simple, easy daily plan for you to follow.

*Here is where you will fill out the chart and make sure they know what products they are using and when during the day, it is important to keep this simple and not overwhelming.*

## **Wish List**

*Use section 3 on the wellness consult form to create their wish list. You are going to point out anything they don't have that came up in sections one and two. Then help them create a list of anything they will be using a lot of and need refills on.*

Now we are going to make your wishlist. This is a great place to keep track of products you will use frequently, I never want you to run out of something that is helping you and your family. We will also add items to this list that you might want to try in the future. This list will be a great place to come back to when it's time to order.

## **Teach how to order**

Now that we have your wish list all mapped out let me explain the best way to order, in order to do that let's sign into your website.

*This is when you will show them how to login to their website, and any basic info about their website that you would like to share.*

There are two ways that you can order, creating a one-time order or creating a Loyalty Rewards Order. You will definitely want to use the loyalty rewards program, because you will get money back on your orders, all of your shipping reimbursed to you, AND you will be able to get certain items BELOW wholesale pricing using these points. I get free oils all the time! It's an amazing program and you can edit your order, or cancel at any time. So that means you can get different products each month, you can even change the date they come.

A lot of my customers have shared with me that they looked at where they were buying all of their skincare, haircare and cleaning products and decided to shift where they were spending it and just put it into a loyalty rewards order, so they would benefit MORE from it. Basically, they weren't spending any more money than they normally would, they needed those things and they figured they might as well get a better deal, free products and money back on your orders to use for FREE products. Not to mention- they are better for your health!

Let's look at your wish list and see some of the items you circled that you wanted or what was recommended for you that you don't have or might need a refill on soon. What were some of the items you listed? *(wait for them to respond)*

Ok, I'm going to walk you through how to place a Loyalty rewards order for that item because I want to make sure understand how it works, it can be confusing at first.

*When possible actually set up their LRP on their website with them.*

Also, many people add the Lifelong Vitality Supplements to their first LRP order because they have a 30 day money back guarantee and they provide more energy, better gut and skin health, less inflammation and are giving you the whole food vitamins and nutrients that you need as a foundation of health and preventive care. Would you like to try them out to see why they are the #1 seller for dōTERRA? It's totally worth it to try, especially since you get your money back if you don't see any positive results! So, how does that order feel?

*Here is where you can help them adjust their order till they are comfortable. Make sure you save it, and select this is for personal consumption so they are taxed on the wholesale rather than the retail price.*

Now that you have your oils, you are going to find that a lot of your friends and family will start coming to you with questions and curiosity, they may even want you to order them a few things.

If you would like to learn how to set up appointments to educate people about the oils just as I have done with you and even get your products paid for, we can set up a time to chat more about that. Would that be something you would like?

*Wait for their response, and follow along below depending on their answer*

**If they say YES:**

*Stay on this page and continue with option A and read the "Exploring the Business" script below*

**If they SAY NO:**

*Turn to the next page and continue with option B.*

I totally get it, I just ask that you connect them with me, and I can make sure they get all of their questions answered and help them just as I have helped you. There are a couple ways to connect us so let me share them with you. *Skip to option B, promoting hosting an event.*

**Option A:**

**Exploring the Business**

Have you ever thought about running your own business? [If yes] Ok great, why is that so important to you?

**[Yes or no]** Here is how it works. You go around having conversations just like the one I had, which was pretty simple right? I can show you how. You will earn commissions on each sale, and as your customers, repeat orders, and team members grow, you will earn additional bonuses.

What a lot of people love about it is the flexibility and after a while, the residual income. Is this something you would like to learn more about?

**[If yes]** Ok great, let's set up a time to talk more about this. We can sit down for about 30 minutes and talk more about you and your goals, what it takes to do this business, how our compensation plan works and how to get started. It will only take about 30 minutes. I have \_\_\_\_\_ and \_\_\_\_\_ available, which works best for you?

**[If no]** Ok, no problem. The door is always open should you change your mind. Go to next page and go through option B.;

## Option B:

### Promote hosting an event

I ask everyone this because most people want FREE stuff. I will run it by you and then you will be able to decide. Either way is ok with me. I just want to make sure you have the option. One of my friends hosted an event, she had five people come over and just for having some of her friends over and giving them an opportunity to learn about dōTERRA she got a ton of free products! Here is how it will work. We will set a date. I will give you sample text of what you can send to invite your friends. It will be fun! If they buy, great, if not, no biggie. My part will take 30-40 minutes. If it takes longer it is because we are having a good time and helping people decide. What do you think?

Great! I am going to help you. The first thing is to set up a time. I am available on \_\_\_\_\_ or \_\_\_\_\_ which works best for you? Now that we have a date I will help you create and invitation and get you the information about exactly how to invite your friends and family.

#### **Asking for Referrals** (see Refer a Friend Program Page)

*Now that you have wrapped up the sale (whether or not they purchased) a great next step is asking for referrals.*

Your order will come on \_\_\_\_\_. Before we finish up, how did you like the presentation?

Here is where you can really help me out. I try only to meet with people I have been recommended to or I know personally.

It would be very helpful if you were to do is jot down 5 people you know that would be nice enough to meet with me.

They don't have to be people you think for sure will buy, just anyone who is nice, and cares about their health.

*(In person)* For every 5 people you give me, I will give you a \_\_\_\_\_ for free. Here is a pen and my notebook, I really appreciate your help. Feel free to use your phone to help you, I am going to step away for a minute. I will be right back.

*(Over the phone or zoom)* For every 5 people you give me, I will give you a \_\_\_\_\_ for free. The easiest thing to do is to share the contacts via text. And if you send them over today I will get that \_\_\_\_\_ in the mail right away. I really appreciate your help.