Activate
BREAKTHROUGH

BUSINESS ADVISOR OVERVIEW

BUSINESS ADVISOR OVERVIEW - SPONSOR'S AID KIT

The purpose of this guide is to help Sponsors grasp the process of the Business Advisor and their responsibilities and duties, ensuring the customer is well-informed about what to expect, leading to a positive experience for both parties.

Key Terms:

Enagic®:
Your direct sales business

Activate Breakthrough (AB):

An educational platform that aids in the online initiation of your Enagic® business.

Sponsor:
This refers to you – the individual responsible for registering the 'customer,' 'client,' or 'lead' into the Enagic® business.

Customer:
The prospective client or lead you're enlisting into your Enagic® business.

Business Advisor:
This is your personal sales representative who will engage in a one-on-one discussion with your customer to finalize the Enagic® deal on your behalf and facilitate the business procedure.

Enagic ID:
Your Enagic identification number under which you will register a NEW client.

Rank:
The position or 'lane' where you will assign your NEW client, such as 1A/2A/3A, etc.

Completed Call:
The call is considered complete when the response is either yes, no, or not at this time.

Closed Sale:
The sale is finalized, and Enagic® has received all required documents.

Role of a Business Advisor (BA):

The Advisor’s job is to manage your client's “business advisor call" at the time and date chosen by your customer. The Business Advisor provides the best strategy for your client to join Enagic®, presents various options, answers startup queries, and directs your client to the next steps in Activate Breakthrough.

The Advisor emphasizes the unique circumstances of your NEW clients regarding getting started, including trifecta and quad strategies, Ukon business strategies, online aspects, financial options, and the use of Activate Breakthrough to establish their Enagic® business.

The procedure is as follows:

- Customer accesses the AB Dashboard, watches the welcome video, and schedules their Advisor Call with the Advisor. The time zone will default to their own.
- Setting up the 3-way Facebook conversation. As the sponsor, you're responsible for creating a Facebook group chat between you, your new customer, and the Advisor, using the Advisor's Facebook account seen in the backend.
- The customer must complete (Steo 1) Renewal Process and (Step 2) High Profit Franchise Course prior to their Advisor Call with the Advisor. If it's not completed, the Advisor will terminate and reschedule the call.
- The Advisor Call takes place over the phone with the Business Advisor.
- The Advisor will update you, the sponsor, about the call's outcome via email or the 3-Way Chat. This ensures you know the direction your NEW client is taking.

NOTE: It's crucial to understand that while you may have steered the conversation a certain way with your client, the Business Advisor as sales experts might direct it differently. This is always done with your NEW client's best interests in mind.

Your Business Advisor also provides assistance for customer inquiries, issues, and complaints, as well as general guidance prior to and during an Advisor call. Services include:

- Assisting in rescheduling Advisor calls through the 3-way chat wherever possible.
- Responding to questions or feedback related to the Advisor sales process.
- Answering general FAQ.

Business Advisors Primary Responsibilities:

- Conducting initial Advisor Calls
- Follow-up Calls (if necessary)
- Closing an Enagic® sale (when applicable)
- Distributing Enagic® Order Forms to your customers.

What does a Business Advisor Call Entail?

- Discussing the best way for your customer to start with Enagic®.
- Providing additional Enagic® information (if needed)
- Discussing financing options (if relevant)
- Addressing any queries about Enagic® and/or setting up an Enagic® business.
- Guiding the customer to the next phase in Activate Breakthrough.

What is not included?

- Goal-setting Session
- Personal Mentoring/Coaching
- Financial advice or details about how the Advisor began
- Conducting Business Advisor calls with existing Enagic® distributors

To ensure the efficiency of your Enagic® sale filing and processing, your Business Advisor provides the following sales processing support:

- Online paperwork to assist your customers with their Enagic® order forms.

- Collaboration with the Sponsor to establish Enagic® Distributor ID and Rank for the sale.
- Verification that ALL Enagic® purchase forms are completed with no missing information.
- Ensuring smooth order processing through Enagic®.
- Maintaining clear communication among your customer, you as the Sponsor, and Enagic®.
- Making sure all necessary supporting documents for Enagic® are provided.
- Assisting with any concerns about order form completion, customer inquiries about Enagic®, and queries from both the customer and the sponsor.
- Sending confirmation to your customer, including the Distributor ID, once the sale has been processed by Enagic®.

Business Advisor Step-by-Step Process:

Step 1:

Once your NEW customer signs up for AB and you get an email notification, YOU send a welcome message to your lead. Here is a suggested script:

"Hi [Customer's Name],

Welcome to the team! Now, you're ready to discover what's possible for you in establishing your online business.

Here are your next steps:

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- Allow yourself 1-2 days to complete the Renewal Process before your Advisor call.
- Finish the High Profit Franchise course in Step 2 on your dashboard.
- Schedule your call with a Business Advisor right away.
- Check out the offerings area to discover what's working for me and the community.
- Pay special attention to our high ticket offer with Enagic®, as this is how we generate a high level of revenue.
- Enjoy your Business Advisor call, which will enlighten your vision and offer viable possibilities for launching your very own successful online business.
- After you have a clear understanding of what is achievable with this business and have decided whether or not it aligns with your income and life goals, let's connect to see where you are.
- I'm excited for you to discover what's available here. Can't wait to talk!

[Your Name]"

Step 2:

As the Sponsor, it's your responsibility to initiate a Facebook Messenger 3-Way group chat between you, your NEW customer, and the Business Advisor as soon as they join the academy. Inform the Advisor about your customer to prepare them for the conversation.

Step 3:

Your customer will need to complete the entire Renewal Process (Step 1) and High Profit Franchise course (Step 2) prior to the conversation. This includes a series of videos and questions.

Step 4:

At the scheduled time, the Business Advisor will call your customer at the provided phone number.

Step 5:

The Business Advisor will conclude the Advisor Call with your customer. The primary goal of the call is to discuss the best way for your customer to get started with Enagic® and to guide them to the Activate Breakthrough stage of the process.

If your customer is ready, the Advisor will finalize the Enagic® sale, set up a follow-up call if necessary, or close the call if the customer decides against Enagic®.

Step 6

After the Advisor call, the Business Advisor will furnish you with the results on messenger and/or email once the call concludes.

There are three potential outcomes from an Business Advisor call:

- The customer is ready to start with Enagic® and will receive an e-form from the Advisor to fill out their information for paperwork.
- The customer needs another call, which the Business Advisor will schedule.
- The customer is not ready to start with Enagic®, and the Advisor will recommend they continue with the Activate Breakthrough education.

Upon an Enagic® transaction's completion, the Advisor will inform your customer about the next necessary steps.

Possible information includes:

*Details of the financial application (if customer is applying for finance)

*The customer will receive a document called 'customer information upload' to enter their personal details. The Businss Advisor will use this to complete paperwork.

*The Business Advisor will complete Enagic documentation (if the client pays upfront, finance has been secured, or E-Payment is used).

The call is deemed 'closed' only after Enagic® has received all required documents.

Step 7

After the 'customer information upload file' is complete both the customer (using the 'customer information upload document') and the Business Advisor will complete all Enagic® forms on behalf of your customer.

Step 8

Once all the necessary Enagic® documents are finalized, which includes customer and sponsor signatures and supporting documents, and verified for completeness, the Business Advisor will submit the order to Enagic® for processing.

Step 9

Once Enagic® finalizes the order, Enagic will email your customer a confirmation, including their Distributor ID. This marks the transaction as complete.

Sponsor Roles and Responsibilities

As the Sponsor, you can take specific actions to ensure a smooth process for your customer and to aid the Business Advisor in offering the highest service level possible to both you and your customer.

- Ensure your customer completes the Renewal Process and Franchise Course before the Advisor call.
- Set up a 3-way Facebook chat with you, your customer and Advisor
- Add notes about the customer to the AB back office for direct communication with the Business Advisor.

Be aware of your customer's scheduled Advisor Call time and date. The Business Advisor maintains a strict schedule, so it's vital that your customer shows up. Send them a reminder email to decrease the chances of them missing the call.

The Business Advisor is dedicated to assisting in closing a transaction and your business's success. Prepare your customer for what to expect during the call.

Ensure that your customers are ready for their call. It is important that they know their call time so they can be present and enthusiastic.

3-Way Facebook Messenger Chats

As the sponsor, you will set up this 3-way chat. The chat is not intended for general conversations. The Business Advisor hosts many 3-way chats every week. Keep this chat brief and to the point.

All communication, aside from the introduction in the 3-Way Chat and post-call with BA, should be communicated in the 'notes' section of the customer's file.

Ensure your customer understands that the Advisor call will be over the phone. Confirm they provided the correct phone number to ensure smooth communication.

Once the Advisor notifies you of an Enagic® sale through back office notes and an email update, reach out to the customer and offer your support.

Remember to enter your Enagic® Distributor ID and Distributor Name exactly as they appear on your Enagic® ID and Rank in the online form as soon as you receive it.

Always keep the line of communication open with the Advisor and check the Notes after the Advisor Call for the result.

Upon sale completion, submit Enagic® Rank and ID in the 3-way conversation (or email if Facebook isn't available).

Always conduct a final check before submitting documents to Enagic®. Check in with the customer post-call and communicate with Sponsor through Notes in the AB back office.

Remember, the Business Advisor is here to support you in growing your business. We look forward to being a part of your journey and that of your customers. The more we work together as a team, the better we can serve you and your customers, making the experience more enjoyable.

The effectiveness of our assistance to you and your customer increases as we strengthen our team collaboration, leading to a more pleasurable experience overall.

Follow-up Actions:

*Review the Notes section after the Advisor Call to understand the result.

*Keep the lines of communication open with your advisor.

*Upon completion of the sale, provide your Enagic® Rank and ID in the 3-way chat or via email to your Business Advisor if you or your customer are not on Facebook.

*The Business Advisor is responsible for a FINAL REVIEW before forwarding documents to Enagic®.

*Ensure the correct Enagic® ID and Rank you give to your Advisor.

*Confirm the Sponsor's Title, whether it's a Company or Personal.

*Reach out to the customer post-call to assess their experience.

*Communicate with the Advisor via the Notes feature in the AB back office.

*Centralizing all information in one place reduces confusion and streamlines communication.

*Add notes at EVERY point of contact.

*Record any updates in the Notes section following phone calls or emails.