

Customer Info

NAME: _____ EMAIL: _____
PHONE: _____ PREFER CONTACT BY: Call | Text | Email | FB
ADDRESS: _____
WHERE DID YOU MEET: _____ DATE: _____
FAMILY/FRIENDS/INTERESTS: _____

INTERESTED IN:

- ☐ Ordering
- ☐ Hosting
- ☐ Fundraising
- ☐ Referrals
- ☐ Becoming a Partner

INFORMATION SENT:

- ☐ Hostess Packet
Date: _____
- ☐ Opportunity Invite
Date: _____
- ☐ Lookbook
Date: _____
- ☐ Add to Newsletter
Date: _____
- ☐ Invite to FB Group/Page
Date: _____

FOLLOW UP:

- ☐ 2 Days after order
Thank them for participating in the party and mention anything you connected about.
Date: _____
- ☐ 2 Weeks after order
Did you get your order? What did you like best?
Date: _____
- ☐ 2 Months after order
Send follow-up video or graphic through preferred contact (ADD VALUE to your message, be personal!)
Date: _____

HOLIDAY CHECK-INS:

Be sure to check in with plenty of time for gift orders to be placed and delivered!

- ☐ Valentine's Day _____
- ☐ Mother's Day _____
- ☐ Father's Day _____
- ☐ Grandparent's Day _____
- ☐ Christmas _____

TRADES *of* HOPE