



New Customer Checklist

This is a checklist of what to do when you get a new Customer.

- 1. Have her complete the Customer Profile including her email & birth date**
- 2. Enter her information on marykayintouch under “Create/Update Customer List”**
- 3. Enter her purchase info on the Weekly Accomplishment Sheet...you can print a Weekly Accomplishment Sheet from marykayintouch. At the top of the home page under “Search” type in Weekly Accomplishment Sheets. When that page pops up, click on Forms and then click on Weekly Accomplishment Sheets. Print several copies so you have one for each week to enter your sales as they happen. At the end of the week enter all your sales information on one Weekly Accomplishment Sheet on marykayintouch and submit to your Director.**
- 4. Send her a Thank You note.** You can purchase note cards from MK Connections on marykay-intouch or purchase a box of pretty cards from the store.
- 5. Make a note in your datebook to call her in 2 days to ask how she’s enjoying her product, see if she has any questions, go over what she’s using in the morning and what she’s using at night, get her guest list and coach her on her upcoming party (if she booked an appt.), and thank her again for allowing you to service her skin care and color needs.**
- 6. Be sure you have her booked for her “Follow Up Color 101 Appt.” within 7 to 10 days of her first appointment.** Ideally you booked her for a “Party” with several of her friends for her “Follow Up Color 101 Appt.” If not, tell her the times you set up for “Follow Up” appts. at your home or invite her to be your guest at your meeting to enjoy her “Follow Up”. It is vital that we see her for a “Follow Up” but we don’t want to be using our time running around the country doing single “Follow Up” appts.! Get several of those “singles” together.
- 7. File the top part of her Customer Profile Card by the month of her birthday...
File the bottom part (hard copy) of her Customer Profile Card in an alphabetical file.
Each time she orders you can attach the Sales Ticket to the back of her Profile Card.
That way when she calls to reorder her favorite lipstick shade...you know what it is:)
You might purchase a 5x8 inch recipe card box, a pack of A-Z Index File Cards and a pack Jan. thru Dec. Index File Cards to fit the card box to keep the Profile Cards filed.**
- 8. Put her on the upcoming Preferred Customer enrollment.** When she receives the new Look Book call to see if she rec’d it and which products she’s most excited about. That will put you In touch with your customers every 2-3 months.
- 9. Send Birthday Card. At the beginning of each month pull out all the Profile Cards in your Profile Box (recipe box) for that month...OR...you can find a list of customer birthdays for each month on marykay-intouch. On home page click “Customer List”...at the top of page click “my Customers”...on the left click “Reports & Labels”...select “Birthday Report”...put in month you want and you will get a list of your customers birthdays that you have entered.
*I send a current Look Book with “Happy Birthday” written in pink next to the address and include a 15% off Birthday Coupon. You can find the Birthday Coupon on our Unit website at: www.myunitsite.com/pcarr. Click on “Training”...click on “Boost Your Sales”...look for 15% Birthday Coupon**
- 10. Invite her to special Mary Kay events as your Preferred Customer...you never know when she might get interested in the business and become your new Team Member!**

Treat your customer like GOLD and she will be worth MORE than gold for years to come.