

5-STEP INVITATION PROCESS

The 5-Step Invitation Process helps you be successful in inviting people to join your Beachbody Challenge™ Groups. If you've followed the first vital behavior, "Invite. Invite. Invite.", then you've already used the F.O.R.M. method you learned about in the [How to Build Relationships](#) lesson to:

- ✓ **1. Invite: Invite to be your friend**
- ✓ **2. Invite: Invite to your Facebook® General Health Discussion Group**

These two steps are key in not only setting yourself up for success, but also for knowing how and when to help people achieve their goals. With these complete, you're now ready to complete the first vital behavior through:

3. Invite: Invite to join your Beachbody Challenge Group

Use the steps in this invitation guide, which includes sample messages and tips, to help people find the right solution to achieve their goals through Beachbody Challenge Groups. You'll also find situation tips at the end of the document to help you through the process.

3. Invite: Invite to join your Beachbody Challenge Group

The sample messages are designed for you to personalize based on each unique situation. Just like you did during the "M" message part of F.O.R.M. to build relationships, your invitation messages should show that you care about helping people, and build trust by focusing on your prospect and their needs. The more you follow the steps in this guide to invite, the easier inviting will become, the more confidence you'll build, and the less obstacles and objections you'll receive.

Invitation Step	Sample Invitation Message	Tips
<p>Step 1: Initial Invite</p> <p><i>Start with Step 1 if you are reaching out to them first.</i></p>	<p>Hi, (NAME), my next 30-/60-/90-day Beachbody Challenge is going to start soon and I know you've been wanting to make a change in your life so I wanted to invite you to join me. I'd love to talk to you more about it; let's chat later today and I'll give you more info, sound good?</p>	<ul style="list-style-type: none"> • Don't overwhelm them with too much information. • Ask if they want to hear more—don't send the second message until they say yes.
<p>Step 2: Engage with a Question</p> <p><i>Start with Step 2 if they reach out to you first.</i></p> <p>USE STEP 2 AT ALL TIMES. THIS IS THE MOST VITAL STEP IN RELATIONSHIP-BUILDING. MASTER IT.</p>	<p>Awesome. I'm going to send you more information, but first I have to ask, what is it that's motivating you to commit and make a change in your life right now?</p>	<ul style="list-style-type: none"> • Slow down and ask questions—if you hear "on-the-surface" answers, ask more questions. • Go back and forth as many times as you need to truly understand their emotional needs. • The deeper their needs and wants, the more likely they are to enroll.

Invitation Step	Sample Invitation Message	Tips
<p>Step 3: Show the "Ever Feel Like This?" Video</p> <p><i>If they want more information, or if they offer some type of objection, show them the video.</i></p>	<p>"Wow, (NAME), I totally get it. I know this Challenge Group can help you (FILL IN THEIR NEEDS/WANTS FROM STEP 2). Do me a favor, check out this quick video on Challenge Groups and let's chat later today about the group details and commitments to see if you're ready to get started and change your life. <Insert video link>"</p>	<ul style="list-style-type: none"> • Share the video from the Coach Online Office Video Library > News > Announcements. • Click the "Share" feature and hit "Copy Link." • The link has your Coach repID and, when clicked, will take your prospect to your personalized Coach website. • Never argue facts. If they have an objection, simply share a tool like the video or stories of people with results, or refer to the "How to Overcome Objections" training.
<p>Step 4: Share Specific Details, Commitments, and Expectations</p> <p><i>After they watch the video and still show interest in your Challenge Group.</i></p>	<p>Okay, (NAME), sounds like you're really ready to (REPEAT THEIR NEEDS/WANTS FROM STEP 2). Here's the deal. Our challenge commitment is for (30/60/90) days, starts on Monday, (start date), and includes:</p> <ul style="list-style-type: none"> • Working out at home using a Beachbody® fitness program • Drinking Shakeology® every day • Being active on our private Facebook Challenge Group page <p>I'd like to get you started as a customer on a Beachbody Challenge pack, which includes your fitness program, your Shakeology Home Direct, and a free 30-day trial of Team Beachbody® club membership so you can access additional fitness and nutritional tips and information, including a personalized meal planner.</p> <p>Are you ready to do this?</p>	<ul style="list-style-type: none"> • They want to know what they're getting into, and you want them to succeed, so set the expectations now. • Keep it simple and direct, and clearly express the commitment they're making and the results and return they'll achieve if they become a Challenge Group member.

Invitation Step	Sample Invitation Message	Tips
<p>Step 5: Help Them Enroll</p> <p><i>Once they're committed to the Challenge Group, help them get started with the solution to fit their needs.</i></p>	<p>Okay, great! I want to get you set up today with your customer account and Challenge Pack, which only takes about 10 minutes. Let's get you started.</p>	<ul style="list-style-type: none"> • Walk them through the enrollment process. • Face-to-Face: Use the Coach Mobile App to enroll them. • Long Distance: Call and walk them through the enrollment process over the phone. Go to your Team Beachbody Coach website without being logged in to Team Beachbody so you can go through the steps with them and see what they see. • Offer the very best customer service to ensure their order is processed correctly and on time.

Enrollment Method	Step-by-Step Process
<p>Enroll customer with the Coach Mobile App</p>	<ol style="list-style-type: none"> 1. Enter their email address. 2. Select "Enroll New Customer." 3. Enter their first and last name and phone number. 4. Click "Shop Now." 5. Select the program and Shakeology flavor your customer chooses. 6. Click "Add to cart." 7. Review order then hit "Submit."
<p>Enroll customer online with a Challenge Pack</p>	<ol style="list-style-type: none"> 1. Go to http://www.BeachbodyCoach.com/screenname (put in YOUR website). 2. Click "Shop." 3. Click the "Challenge Packs" link in the left nav. 4. Choose your Challenge Pack. 5. Check out. 6. Verify their order is complete.
<p>Enroll a customer online as a Shakeology HD customer if the customer already owns a fitness program</p>	<ol style="list-style-type: none"> 1. Go to http://www.BeachbodyCoach.com/screenname (put in YOUR website). 2. Click "Shop." 3. Choose "Shakeology" and order the bag or packets of your choice. (Reminder: There's free shipping for Home Direct orders.) 4. Check out. 5. Verify their order is complete.

SITUATION SCRIPTS

Didn't anticipate you'd forget a step, or that your prospect wouldn't respond? No worries, nobody's perfect, which is why we created scripts for situations like these to get you back on track. Remember to modify the language to fit your personal style.

Situation	Sample Message
My prospect didn't respond to Step 1 or Step 2.	Hi, (NAME), did you get my message about my Beachbody Challenge Group? I already have people moving forward and wanted to make sure I didn't miss you by accident. Would you rather I come back around to you for the next Challenge Group, or did you want to hear more about this group?
My prospect asked about price immediately after Step 1 before we even got to Step 2.	Hi, (NAME), thanks for asking me about the Beachbody Challenge. The initial cost is anywhere from \$140 to \$245, depending on what you need to get started. I'll send more information in another message, but first I have to ask, what is it that's motivating you to commit to making a change in your life right now? The more I understand why you're interested, the better I can help you get connected to a solution that's right for you.
I messed up and didn't use Step 2 and failed to get my prospects needs and wants.	Hey, (NAME), I need to apologize; I sent you the video before I had a chance to ask you what interested you about the Challenge. What's motivating you to commit to making a change in your life right now? The more I understand why you're interested, the better I can help you get connected to a solution that's right for you.
My prospect didn't respond to Step 3.	Wait 48 hours, then say: Hi, (NAME), I'm not sure where we left off. I already have people who have joined my group and are moving forward and just want to make sure I didn't leave you out by accident. Did you have a chance to watch the video?
My Prospect didn't respond to Step 4 or Step 5.	Hi, (NAME), I'm not sure where we left off. I already have people who have joined my group and are moving forward and just want to make sure I didn't leave you out by accident. I know you wanted to (REPEAT THEIR NEEDS/WANTS/GOALS FROM STEP 2). Did you want me to go ahead and fill this spot with someone else and move you to the next Challenge Group, or were you ready to get started now?

Review the training on "How to Overcome Objections" for sample messages and tips on how to help prospects overcome their objections and connect to a Beachbody solution to help them achieve their goals.