Maximizing the Re:Vive Program:

Webinar 2: Engage Your Leadership Team and Prioritize Your Contact Strategies

Using SUCCESS TRACKER and Excel for a Targeted Strategy

- **GENERAL OBJECTIVE**: to review how to select Success Tracker data and move it to Excel.
- **SPECIFIC OBJECTIVES (Webinar 2)**:
  First, to use Success Tracker to help select your Leadership Team.
  Second to use an Excel "targeted sorting strategy" to identify your best candidates to approach during the Re:Vive campaign.

ENGAGE YOUR LEADERSHIP TEAM

1. In Success Tracker, select the **"Recognition"** group of reports from the left-hand menu.

2. Select the **"Downline Leaders"** report from this group.

3. In "Step 1" of the Downline Leaders report:
   a. Enter your Country
   b. Enter Your Account Number

4. In "Step 2," select the last completed Business Period (for example, during BP 3, you would want to examine the BP 2 records)

5. In the report, examine your Leaders in each leg to select your "Leadership Team" to partner with you in Operation Re:Vive.

6. The "Show Next Level" report shows you the "gap" the Leaders had last BP to get to the next Leadership Level, and it can be helpful in goal-setting.

PRIORITIZE YOUR CONTACT STRATEGIES

PROCESS: Our 4-Step Process for working with Success Tracker data:

GET IT! MOVE IT! SORT IT! APPLY IT!

Have Success Tracker & Excel Open

A. GET IT!

1. In Success Tracker, select the **"Genealogy group"** from the left-hand menu.

2. Select **the "Genealogy" report** from this group.

3. In "Step 1" of the Genealogy report:
   a. Enter your Country
   b. Enter your Account Number (or the Account number of the leg, group or leader whose data you want to save.)
   c. Now skip down to "Step 4" in the Genealogy report.

4. In "Step 4," you will **"customize"** the information you want to save for your permanent records.
   a. Click on "Selected Columns" which opens all your options for information to choose.
   b. Uncheck "Select/Deselect All" at the top) to clear out the default choices.

c. Select these suggested columns specifically selected for this strategy OR revise to your own preferences. Be sure to include the three highlighted options.

Account Number	Auto Order
Name	PPV Current
Enroller Name	PPV 1 BP ago (& 2, 3, 4 BPs ago)
Physical Level	**Career Purchases***
Phone numbers	**Last Order BP***
Terminated*	Next Auto Order PPV
Enrollment Level	Email
Leadership Level	Orders in Prior 6 BPs

d. After checking your selections, click on "Continue to Next Step."

5. In "Step 5" of the Genealogy report:
   a. Open the drop down box and select "Tab Delimited."
   b. Click on "Show Report."

B. MOVE IT!

1. Select the "Edit" menu from the top.
2. To highlight ALL the data, choose "Select All" [or Ctrl A]
3. To COPY the data (that is, hold in memory), select "Copy" [or Ctrl C]
4. Move to your Excel spreadsheet (which should be open)
5. PASTE the data by placing your cursor in the top left (A-1) cell, and select the "Paste" button (in the top left hand corner) [or Ctrl V]
6. Using the "Save As" button, you will want to SAVE this as a document in your own filing system.

C. SORT IT!

1. Eliminate all Terminated accounts.
   a. Select the "Term" column.
   b. Sort by "ZA."
   c. Select all "Y" boxes ["Yes" = "Terminated"] through right-clicking on the numbers on the left; then press "Delete."

2. Identify and Eliminate Currently Active Associates.
   a. Select the "Last Order BP" column.
   b. Sort by "ZA."
   c. Delete all accounts with product orders in 2014 and 2015.

3. Identify the Highest Commitment Candidates.
   a. Select the "Career Purchases" column.
   b. Sort by "ZA."
   c. Delete the accounts below a selected threshold (perhaps 5000 GPV)

4. Identify the Most Recent Purchasers from your Highest Commitment Candidates.
   a. Again select the "Last Order BP" column
   b. Sort by "ZA."
   c. You now have your most recent purchasers at the top!

NOTE: These steps and skills can be applied to many other target strategies. The sky is the limit!