



# REFERRAL PROGRAM





## **GOALS**

1. Enroll our members in our growth strategy
2. Raise our total Active accounts by 20%

## **OFFER - Give \$20, Get \$20.**

This program allows our members to offer friends and family an introductory offer of \$20.00 off their first week with us. For each successful referral, our members earn referral credit for \$20.00 that will be applied to their next order.

## **HOW TO DIRECT MEMBERS TO PARTICIPATE**

1. Use the referral links or the unique referral code that can be found in your welcome email or your PLN account page.
2. Invite friends to join PLN via email, a direct link, Facebook, Instagram, Twitter, or send them to the store with your unique referral code. Each friend you refer to PLN will receive a \$20 coupon applied to their first subscription order. Your \$20 Coupon will be applied to your next upcoming order.

*\*IT IS IMPORTANT TO MAKE IT CLEAR THAT THE REFERRER GETS THE \$20.00 CREDIT APPLIED TO THE WEEK AFTER THE REFERRED RECEIVED THE REFERRAL CREDIT. THE ONLY EXCEPTION TO THIS IS IF THE NEW MEMBER IS BILLED MIDWEEK 'IN THE MOMENT', IN THIS CASE, THE REFERRER WOULD RECEIVE THE \$20.00 CREDIT IN THE CURRENT WEEK.*

## **TERMS**

If a referred friend makes a purchase through any method other than the referral link or by entering the unique referral code at checkout, you will not receive a coupon.

*\*If an in-store sign-up mentions a member referred them, we can process a manual referral.*

There are no maximum referral credits that can be earned through this program, but only one \$20 Credit will be applied at a time (weekly).

For instance, if five friends take advantage of your referral link in the same week, you will benefit from \$20 off your plan for the next five weeks.



### PRO-TIPS

1. When speaking with prospective members during the Lean Consultation process, ask them if a member has referred them. The question will ensure we give our members credit for referrals and give us our first opportunity to introduce them to Give \$20, Get \$20.
2. Use the Give \$20, Get \$20 rack cards in the boxes of all new members.
3. Distribute Give \$20, Get \$20 rack cards to all current members

### AUTOMATED EMAIL COMMUNICATIONS

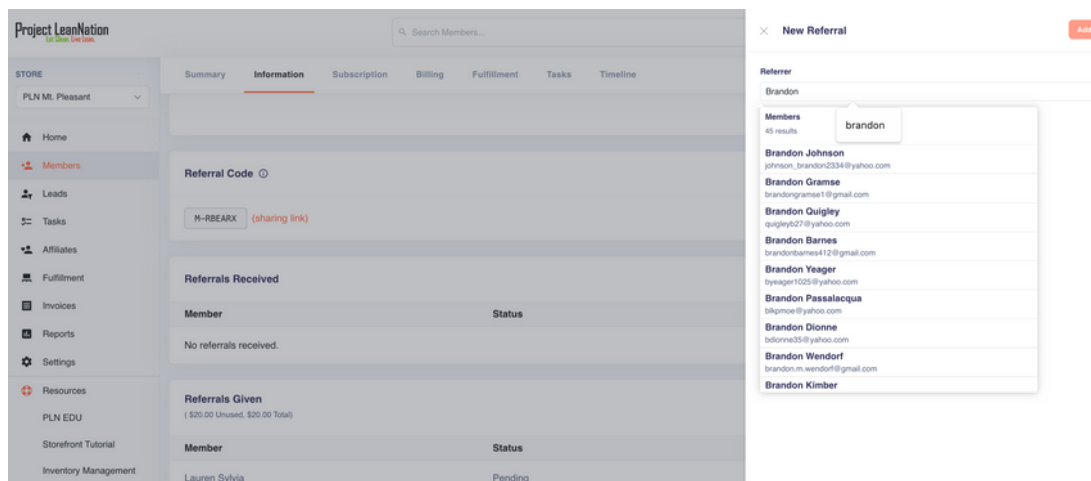
1. Program content and link go out in our "Welcome Email."
2. Reminder emails about the program will go out on weeks 3,6, and 9.
3. Each time a member successfully refers a new member, they are sent a "Thank you" email.

### THE PROCESS

Everything in this system is automated when our member's referrals come via the link or coupon code. If a new member shares that someone has referred them and only have their name, this can be added manually.

Got to Member > Information > Referrals Received > Add > Add the new referral by selecting the 'Referrer' name.

**\*THIS IS ALWAYS DONE IN THE NEW MEMBERS ACCOUNT (NOT THE REFERRERS ACCOUNT)**





## HOW THE DATA IS REFLECTED IN THE NEW MEMBER'S ACCOUNT (REFERRAL)

In this case, Amanda referred Lauren. You will see Amanda's name under 'Referrals Received' when viewing Lauren's account.

The screenshot shows the Project LeanNation interface for a member's account. The left sidebar contains navigation options: Home, Members, Leads, Tasks, Affiliates, Fulfillment, Invoices, Reports, Settings, Resources, PLN EDU, and Storefront Tutorial. The main content area is titled 'Information' and includes a search bar for members. Below the search bar, there are three sections: 'Referral Code' (M-NFCXBH), 'Referrals Received' (table with 1 entry), and 'Referrals Given' (No referrals given).

Member	Status	Received On
Amanda Nicole Schroeder	Pending	05/27/2022

## HOW THE DATA IS REFLECTED IN THE CURRENT MEMBER'S ACCOUNT (REFERRER)

You will see Lauren's name under 'Referrals Given' when viewing Amanda's account.' In this case, Amanda's referral credit is pending Lauren's successful billing cycle. If the referral (Lauren) remains in an 'Unpaid' status, the referrer (Amanda) will not receive the referral credit.

The screenshot shows the Project LeanNation interface for a member's account. The left sidebar contains navigation options: Home, Members, Leads, Tasks, Affiliates, Fulfillment, Invoices, Reports, Settings, Resources, PLN EDU, and Storefront Tutorial. The main content area is titled 'Information' and includes a search bar for members. Below the search bar, there are three sections: 'Referral Code' (H-RBEARX), 'Referrals Received' (No referrals received), and 'Referrals Given' (table with 1 entry, showing a \$20.00 credit).

Member	Status	Given On
Lauren Sylvia	Pending	05/27/2022