Making Success Tracker Work for YOU!!
USING SUCCESS TRACKER TO MAXIMIZE "WELCOME BACK" 2018

OBJECTIVES:

1. To review the process of selecting Success Tracker data and moving it to Excel
2. To strategically sort and apply the data to support the 2018 Welcome Back program

A. CAPTURE THE DATA

Have Success Tracker and Excel Open

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. Skip down to "Step 4" of the Genealogy report.
4. In "Step 4," select "Selected Columns" to choose the data you want for your task.
    a. Uncheck "Select/Deselect All" at the top to clear out the default choices.
    b. Select these suggested columns OR revise to your own preferences. **(bold ones are key!)**

Account Number	Leadership Level
Country	Highest Leadership Level
Last Name	Auto Order
First Name	PPV Current Period
Business Name	PPV 1 Period Ago (& 2, 3, 4)
Sponsor Name	**<u>Career Purchases</u>**
Enroller Name	**<u>Last Order BP</u>**
Physical Level	Next Auto Order Date
Phone numbers	Email
<u>Terminated</u>	**<u>Orders in Prior 6 BPs</u>**
Enrolment Level	

    c. 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 THE DATA

1. Select the "Edit" menu at the top.
2. Highlight ALL the data by choosing "Select All" [or Ctrl A].
3. COPY the data—that is, hold in memory—by selecting "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. SAVE the document in your own filing system by using "Save As" [or Ctrl S]

C. SORT (and apply) THE DATA

GOAL: Reactivation

- find the data to support my efforts to "win back" my inactive Associates and Customers with the highest odds of re-establishing their Mannatech product purchases

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

2. **Step 2:** Identify and Eliminate Currently Active Associates.
   a. Select the "Orders in Prior 6 BPs" column
   b. Sort by "ZA"
   c. Delete all "Yes" boxes
   d. Save Report ["InactiveAccounts Aug 2018"; tab 1 – "All")

3. **Step 3:** Sort "Inactives" into 2 groups:
   [Group 1 – recent] –Last Order since Feb 2016
   [Group 2 – older] – Last Order prior to Feb 2016
   a. Select "Last Order BP" column
   b. Sort by "ZA"
   c. Separate Group 1 from top (2018-01) to 2016-03 and save on tab 2 ("Recent")
   d. Separate Group 2—the rest—2016-02 and older; save on tab 3 ("Older")

4. **Step 4:** Identify the "Highest Commitment" people (as demonstrated by Career Purchases)
   START WITH "RECENT" GROUP
   a. Select the "career Purchases" column
   b. Sort by "ZA" (Highest to lowest)
   RESULTS: CORPORATE WILL CONTACT 10,000+ AND 2,000+ GROUPS

5. **Step 5**: Establish your Personal Action Plan
   OPTIONS
   a. Follow-up (or precede) Purchasers that Corporate will contact
   b. Contact appropriate Purchasers from lower volume "Recent" group
   c. Contact appropriate Purchasers from "Older" group