

# PURGE STRATEGY #2

## Contacting your Leadership Team about the Purge

### Using SUCCESS TRACKER and Excel for a Targeted Strategy

- **GENERAL OBJECTIVE:** See “part 1” to review selecting Success Tracker data and moving it to Excel.
- **SPECIFIC OBJECTIVES:** First, to use Success Tracker to help select your Leadership Team.  
Secondly, use an Excel “targeted sorting strategy” to identify your best candidates to approach during the month.
- **PROCESS:** Our 2-Step Target Process for working with Your Team:
  1. SORT IT!
  2. APPLY IT!

### 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 12, you would want to examine the BP 11 records)
5. In the report, examine your Leaders in each leg to select your “Leadership Team” to partner with you in retaining your people and re-engaging as many as possible.
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

Have Success Tracker & Excel Open

## **SORT IT!**

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."

Identify and Eliminate Currently Active Associates.

- d. Select the "Last Order BP" column.
- e. Sort by "ZA."
- f. Delete all accounts with product orders in 2021 and 2020.

Identify the Highest Commitment Candidates.

- g. Select the "Career Purchases" column.
- h. Sort by "ZA."
- i. Delete the accounts below a selected threshold (perhaps 1,000 PV)

3. 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!