



# Client Retention Worksheet

Simple, Actionable Steps To Use Now and Guide You Down The Road

## 5 Common Challenges

1. Not knowing where to start
2. Not preparing in advance/not having a system
3. Being flaky or inconsistent
4. Not following up because you're ashamed or feel at fault
5. You don't give them a reason to stay for the long run/they don't know you want them to

## 5 Simple Strategies

1. Ask for feedback:

This is a concept a friend of mine is always repeating; one of the only things he says he learned in business school. "Follow the ants." Basically, let your clients guide you. Ask them what they want, what would make their experience even better – translating into happier more satisfied clients -- and then find a way to address it. Instead of spending time imagining what they want or what you would want and hoping they line up. Just ask.

### Tips

- Print or email surveys after their first visit or first trial period, depending on what you offer.
- Twice a year survey to entire client population
- Face to face feedback after they've had a chance to build some trust with you.

2. Know your business and your clients. Make a plan: (From The Pilates Biz)

It is so much easier to know what's coming and simply address it then scrambling when things are falling apart. A little forethought and preparation go a long way.

Make a list of areas where you know clients get stuck or fall off track. Set aside a time at the beginning of the year and make a plan. Once a month look ahead and see what's coming so that you can help mitigate anticipated drop-off. Also have a plan for the unpredictable circumstances students use as excuses for not coming back in.

### Tips

- Consider:
  - o Times of year (seasons, holidays, school schedules)

- Different phases in their practice (2 months, 6 months etc.)
- After they've been absent for more than 2 weeks
- After an illness or vacation
- If you were out of town
- If you are going to have a sub (*We know how students sometimes would rather not come in than have a sub. Find a way to support them in coming no matter what.*)

### 3. Be consistent and follow through:

There are two ways being flaky and inconsistent can backfire. First, clients will feel like they are not a priority, like you don't need their business, and you don't have their best interest at heart. Second, they will never know what to expect and therefore won't depend on you or trust you to guide them.

Students want a flawless and predictable experience. "They don't want to see behind the curtain" as one of my teachers recently remarked, which means you need to be steady. Make sure you make good on what you are selling. If you have a referral plan, keep it consistent, if you have a follow-up procedure or policy, keep it consistent.

#### Tips

- Keep it simple!! Keep it manageable and simple!
- Do everything you can do not cancel classes. If you have staff make sure they know the protocol for getting classes covered and keep cancelations as close to zero as possible.
- If you send one client a birthday note, send everyone one. Make it a "best practices" in your studio so everyone is on board.

### 4. Make it personal: (From The Pilates Biz)

Even when you feel like the client is beyond reach or like you could have or should have done more, don't be afraid to reconnect. Those students who have made a commitment to you once are more likely to do it again. And if they are feeling ashamed for having dropped off the face of the earth your friendly encouragement could make all the difference. Making a real connection works as part of your system and for when *you've* gone astray.

Find a way that feels authentic to you to follow-up or reach out to your students at different phases of their practice. Hand-written notes or phone calls usually work best for adding that personal touch. Email works too, but make sure your client is an emailer and never send a bulk email. Remember to make it personal.

#### Tips

- Follow up written notes with phone calls
- Send personal birthday notes or coupons
- Make connecting and finding out how they are doing your priority. It's not a sales pitch. Find out if there is some way you can support them in their practice.

### 5. Be the expert, be clear, set a course:

When a new client walks in to your space they do so with the expectation that you are the expert and you know how this works. They need you to guide them, tell them how to practice and make recommendations that support their needs. When you are unclear, they are unclear and will inevitably seek guidance elsewhere.

Know how you want students to use your services. Be clear about your long-term objectives. Let them know from the beginning what is possible and how you are going to help them achieve it. Get them excited about achieving it too!

#### Tips

- Explain how your services work and how you take care of your students step by step.
- Invite them to begin by making a firm recommendation based on their needs.
- Explain to them what the possibilities are 1 month from now, 6 months, 6 years from now.
- Help them see themselves as a healthy, pain-free practitioner for the long run.

### **BONUS Strategy!**

#### 6. Offer Value: Giving more than you get.

Students/clients are like any other customer, they want to know they are getting a good value. Look for ways to add something extra or special to your services, something no one else in your area offers.

#### Tips

- Monthly practice tips (in print or email)
- Sending them follow-up emails with homework notes or tips
- Online resources such as an audio or video routine (doesn't have to be yours, it could be a resource page to ones you love).
- Hot tea at the front door
- Be creative

### 5 Ways to Keep Evaluating

1. Review your retention every month. Look at who stayed, where they started, how they are practicing now and evaluate any relevant circumstances (positive and negative) that might have effected their decision.

2. Those semi-annual surveys do wonders. You may think you know your clients, but do you really? Don't guess. Know. Send out a survey (via email or in print) every six months or at the end of every year. Find out what's working and be proactive.

3. Self-evaluation – There are times when things seem to be off. We have ebb in business or we feel unmotivated. Look at what's going on with honest eyes. Is there a new trend emerging with your clients? Did you change something? Are you in a slump and your clients are noticing and not showing up? When there is a rough spot see if you can make it an opportunity for positive change.

4. Be willing to change course. As your teaching or business, or both, grow and change you also have to change your approach. Make sure that when you change your priorities or commitments – or even location – that you also evaluate how you are handling clients. Time makes a difference too. Your approach from 1998 could probably use some correcting just about now. But seriously, even when you notice things are not working out quite like you planned, don't ignore it. Do something about it.

5. Stay true to yourself. No matter how you go about maintaining clients it should feel authentic. Occasionally asking yourself if you're feeling good about how you run your business can keep you grounded and on track with your core-values. It is easy to follow someone else's advice only to find that those things don't actually support what you are most committed to. Remember it's a work in progress because you're a work in progress. 😊