



Client Retention Planning

\$1,849

Fully Editable Client Packet

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The Service Standard Institute

What Client Retention Planning Is Designed to Do Acquiring a customer is only the beginning. Retention planning helps your business create a more consistent experience after the first sale so customers are more likely to stay, renew, purchase again, refer others, and speak positively about your brand.

Primary Retention Objectives

- Identify why customers stay, leave, complain, or become inactive
- Improve the experience from onboarding through follow-up
- Strengthen service consistency across participating team members
- Create clearer customer communication standards
- Improve renewals, repeat purchases, reviews, and referrals
- Reduce preventable customer loss and service recovery failures
- Build practical retention workflows and accountability
- Create a measurable plan for protecting long-term revenue

What You Receive

- A review of your current customer journey and retention practices
- A tailored retention strategy for your business
- Customer communication and follow-up recommendations
- Service recovery and complaint-handling guidance
- Suggested retention KPIs and tracking measures
- Recommendations for loyalty, renewal, review, and referral opportunities
- A prioritized implementation roadmap
- Participation for up to two team members

Important: This engagement provides strategy, planning, training guidance, and recommendations. Software, paid campaigns, full CRM implementation, graphic design, custom automation, or ongoing account management may require a separate agreement.

Retention Planning Engagement Structure

| Phase | Focus | Core Activities |
|-------|---------------------------------|---|
| 1 | Discovery & Baseline | Review the current customer journey, customer types, retention data, complaints, reviews, and follow-up practices. |
| 2 | Gap Identification | Identify breakdowns in onboarding, communication, service consistency, follow-up, renewals, and service recovery. |
| 3 | Retention Strategy | Develop practical strategies for loyalty, repeat business, referrals, renewals, feedback, and customer re-engagement. |
| 4 | Team Alignment | Clarify responsibilities, service standards, communication expectations, escalation points, and accountability. |
| 5 | Implementation | Organize recommendations by priority, owner, timing, measurement, and |

| Phase | Focus | Core Activities |
|---------|-------|---------------------------|
| Roadmap | | expected business impact. |

Recommended Retention KPIs

- | | |
|--|--|
| <input type="checkbox"/> Customer retention rate | <input type="checkbox"/> Customer churn rate |
| <input type="checkbox"/> Repeat purchase rate | <input type="checkbox"/> Renewal rate |
| <input type="checkbox"/> Average customer lifetime value | <input type="checkbox"/> Referral rate |
| <input type="checkbox"/> Review request completion | <input type="checkbox"/> Positive review rate |
| <input type="checkbox"/> Complaint volume | <input type="checkbox"/> Complaint resolution time |
| <input type="checkbox"/> Customer response time | <input type="checkbox"/> Reactivation rate |

Business, Customer & Revenue Questions Please answer thoroughly. Honest information helps TSSi identify where retention is being gained or lost.

1. What is the name of your business?

2. What products or services do you currently provide?

3. Which product, service, membership, or contract is the primary focus of this retention plan?

4. Who is your ideal customer or client?

5. What is your average customer or contract value?

6. How long does a typical customer relationship last?

7. What percentage of customers purchase again, renew, or continue service, if known?

8. What percentage of customers stop purchasing, cancel, or become inactive, if known?

9. What are your top three revenue goals for the next 12 months?

10. What portion of future growth do you expect to come from current or past customers?

Customer Journey & Onboarding

11. How does a customer first learn about your business?

12. What happens immediately after a customer purchases, signs, books, or enrolls?

13. Who is responsible for welcoming or onboarding the customer?

14. What information does the customer receive at the beginning of the relationship?

15. Are expectations, timelines, responsibilities, and next steps clearly explained?

16. What points in the customer journey create the most confusion?

17. Where are delays, missed handoffs, or communication breakdowns most likely to happen?

18. How do you confirm that the customer is satisfied after delivery or service begins?

19. What follow-up occurs after the first purchase, appointment, project, or service milestone?

20. How is the customer experience documented or tracked?

21. What would an ideal customer journey look like from beginning to end?

Customer Loss, Complaints & Service Recovery

22. What are the most common reasons customers leave, cancel, or fail to return?

23. At what point are customers most likely to become dissatisfied or inactive?

24. What complaints or concerns are repeated most often?

25. How are complaints currently received, assigned, tracked, and resolved?

26. Who has authority to correct a customer problem or approve a recovery solution?

27. How quickly are customers contacted after a complaint?

28. Do you have a formal service recovery process? If yes, describe it.

29. How do you follow up after a complaint has been resolved?

30. Have you lost customers because of employee communication or inconsistent service?

31. What customer issue has caused the greatest financial or reputational impact?

32. What would prevent the same issue from happening again?

Repeat Business, Loyalty, Renewals & Referrals

33. Do you currently ask customers to purchase again, renew, upgrade, or add services?

34. When and how are renewal or repeat-purchase conversations started?

35. Do you have a formal customer loyalty or appreciation program?

36. How do you recognize long-term, high-value, or repeat customers?

37. Do you have a referral process or incentive?

38. How often do you ask satisfied customers for reviews or testimonials?

39. What percentage of customers provide referrals, reviews, or testimonials, if known?

40. Do you contact inactive or former customers? If yes, how?

41. What offers could encourage customers to return without unnecessarily discounting your value?

42. What customer milestones could be used for follow-up, appreciation, or renewal conversations?

Communication Standards & Team Readiness

43. Which two team members will participate in the retention planning engagement?

44. What are each participant's current responsibilities?

45. Who owns the customer relationship after the sale?

46. What communication channels are used with customers?

47. Are email, phone, text, and social responses guided by written standards or scripts?

48. How quickly are customer questions and messages expected to be answered?

49. How is customer information shared between departments or team members?

50. What customer service training has the team completed?

51. What customer conversations are most difficult for the team?

52. What accountability issues currently affect follow-up or service consistency?

53. What authority do the participating team members have to make changes?

54. Who will approve the final retention plan and implementation priorities?

Systems, Data & Measurement

55. Where is customer information currently stored?

56. Do you use a CRM, membership platform, scheduling system, or customer database?

57. Can you identify active, inactive, repeat, high-value, and at-risk customers?

58. What customer data is currently tracked?

59. Do you track cancellations, lost customers, refunds, complaints, reviews, or renewals?

60. How often is customer data reviewed by leadership?

61. What reports or dashboards are currently available?

62. What retention metric is most important to your business?

63. What information is missing that would help you make better retention decisions?

64. What software or process limitations could affect implementation?

Retention Goals, Priorities & Implementation

65. What would a successful retention outcome look like in the next 30 days?

66. What would a successful retention outcome look like in the next 90 days?

67. What would a successful retention outcome look like in the next 12 months?

68. Which customer segment should receive the greatest immediate attention?

69. What process must improve first?

70. What team behavior must change for the retention plan to work?

71. What customer communication should be created or improved?

72. What is the biggest risk to successful implementation?

73. How much time can the team commit to retention activities each week?

74. What support does your business need most from TSSi?

Retention Planning Asset Checklist Provide what is available. Missing information may limit the depth of analysis in that area.

- Customer & Revenue Data ■ Current customer list ■ Past or inactive customer list
- Renewal data ■ Cancellation data
- Repeat purchase data ■ Customer lifetime value information
- Refund history ■ Revenue by customer segment
- Customer Experience Materials ■ Welcome or onboarding messages ■ Service agreements
- Customer instructions ■ Follow-up emails
- Text templates ■ Voicemail scripts
- Review request messages ■ Referral messages
- Feedback & Service Recovery ■ Customer reviews ■ Complaint logs
- Refund requests ■ Survey results
- Service recovery examples ■ Escalation procedures
- Common objections ■ Customer satisfaction reports
- Systems & Team Resources ■ CRM screenshots or export ■ Customer journey map
- Team responsibilities ■ Current service standards
- Response-time expectations ■ Training materials
- Renewal calendar ■ Loyalty or referral program details

Participating Team Members

Team Member 1: Title/Role:

Email: _____ Phone: _____
 Team Member 2: _____ Title/Role: _____
 Email: _____ Phone: _____

Retention Action Plan Worksheet Use this page after your planning review to organize the actions that will move forward first.

| Priority | Action | Owner | Due Date | Success Measure | Status |
|----------|--------|-------|----------|-----------------|--------|
|----------|--------|-------|----------|-----------------|--------|

Leadership Notes

Client Participation & Engagement Expectations For the Strongest Planning Experience

- Provide accurate customer, revenue, and service information
- Ensure both participating team members attend scheduled sessions
- Complete requested questions and provide available assets
- Respond to clarification requests in a timely manner
- Identify one final decision-maker for approvals
- Be open to reviewing customer-experience gaps honestly
- Assign owners and deadlines to approved retention actions
- Track agreed retention measures after implementation begins

General Terms The \$1,849 fee covers the Client Retention Planning engagement for up to two participating team members. The engagement includes review, planning, strategy, recommendations, and guided team alignment based on the information provided by the client.

The engagement does not guarantee a specific retention percentage, revenue increase, number of renewals, referrals, reviews, or repeat purchases. Results depend on customer behavior, market conditions, the accuracy of available data, team participation, implementation quality, and ongoing execution.

Additional participants, implementation services, CRM configuration, automation, message writing, employee training, mystery shopping, ongoing consulting, or account management may be quoted separately. Payment reserves planning capacity and confirms the client's intent to participate.

Client Acknowledgment Business Name: _____

Authorized Representative: _____

Signature: _____ Date: _____

Secure Your Client Retention Planning Engagement Up to Two Team Members

\$1,849 Complete payment to reserve your engagement. After payment, complete this intake packet and gather the requested customer, service, and retention information.

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