

USE THIS CHECKLIST TO IDENTIFY WHERE MOMENTUM IS LEAKING BEFORE JANUARY STARTS.

#### POST-SALE PRESENCE

- Thank-you sent within 24 hours
- Clear next steps communicated
- No long periods of silence

#### HUMAN VS AUTOMATION

- Escalation paths were clear
- Humans stepped in when urgency was high
- Automation supported – not blocked – customers

#### ONBOARDING & EARLY VALUE

- First-time buyers received guidance
- A quick win was delivered in week one
- Customers knew what success looked like

#### LOYALTY & RECOGNITION

- Repeat customers were acknowledged
- Perks or early access were offered
- Loyalty felt immediate, not delayed

#### JANUARY READINESS

- January messaging planned in December
- Customers invited into what's next
- Clear reason given to return in January

#### SCORE YOURSELF:

- **13-15: MOMENTUM PROTECTED**
- **9-12: LEAKS EXIST – FIX NOW**
- **<9: JANUARY CHURN IS ALREADY BAKED IN**

**LOW SCORE = LOST MOMENTUM.**  
**HIGH SCORE = COMPOUNDING GROWTH.**