

IF RETENTION ISN'T WHERE IT SHOULD BE, ACQUISITION WILL ALWAYS FEEL EXPENSIVE. BEFORE CHASING MORE LEADS, USE THIS WORKSHEET TO SEE WHERE CUSTOMERS ARE SLIPPING AWAY — AND WHY RETENTION IS UNDERPERFORMING.

TICK ✓ IF TRUE.
MARK × IF BROKEN.
× = A RETENTION LEAK.

FIRST IMPRESSIONS & ACQUISITION HANDOVER

Where acquisition effort often gets wasted

- ☐ New customers know exactly what happens next
- ☐ Sales handover feels seamless, not disjointed
- ☐ Momentum continues immediately after the sale
- ☐ Customers don't repeat themselves

POST-PURCHASE EXPERIENCE

Where acquisition spikes often die

- ☐ Customers are thanked and reassured
- ☐ There are no long periods of silence
- ☐ Follow-ups add value, not noise
- ☐ Automation supports confidence, not replaces it

ONBOARDING & FIRST 30 DAYS

Where retention is actually decided

- ☐ A clear onboarding path exists
- ☐ A quick win is delivered in week one
- ☐ Expectations are set early and reinforced
- ☐ Proactive check-ins replace reactive support

SUPPORT & CONFIDENCE UNDER PRESSURE

Where churn quietly accelerates

- ☐ Response times are reliable
- ☐ Issues are resolved, not just closed
- ☐ Escalation paths are clear
- ☐ Customers feel heard when urgency is high

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LOYALTY & RETENTION SIGNALS

Where profit actually compounds

- ☐ Repeat behaviour is recognised early
- ☐ Customers are given reasons to return
- ☐ Loyalty is rewarded quickly
- ☐ Retention is tracked as a revenue metric

SCORE YOURSELF

16–20 ✓ → Retention-led growth potential

11–15 ✓ → Acquisition masking retention leaks

≤10 ✓ → Growth is leaking every month

If your score is low, this isn't a lead problem.
It's a **CX clarity problem**.