

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 HANOVER

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

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

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

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

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.

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**.