



Client Retention Management

General Ongoing Retention

- Once per month - Contact clients who have not returned after 4 weeks, give them a special offer
- Once per month - Contact clients who have not returned after 6 months, give them a special offer
- Once every 1-2 years contact all students who have not returned, offer them your intro again (even if they've already done it), potentially offer them a discount on your intro

How to find clients who have not returned after 4 weeks / 6 months / any time frame:

Step 1 – Find clients who have not returned

Reports > Clients > Visits & Retention > **No Return** > select desired dates (end date at least 4 weeks ago) > Tag New

Step 2 – Remove AP Members

Reports > Sales > General Sales > **Sales by Service** > dates last month > select tagged clients only > Main service category > Pricing Options all Autopay options only > Tag Remove (do not generate)

Step 3 – Create your list

Reports > Clients > Marketing > **Mailers & Data Exports** > check Tagged Clients Only > Generate or Export list

Retention Emails

***You can send these emails automatically by signing up for Mindbody Accelerate at an additional monthly fee, or pull the reports and send the emails manually.**

4 Week No Return Email

<STUDIOLOGO>

Dear <CLIENTFIRSTNAME>,

We're sad because we noticed you haven't been to Nomad Yoga Studio in a while! Maybe you're sad too because you remember that post-class-yoga-glow feeling! We would like to offer you a special discount to get you back into yoga room because we believe Nomad Yoga is the bomb! It can change your life and body in the most amazing ways and we want to help you live a better life, so we're offering you:

<INCENTIVE>*

Visit our tuition page at <STUDIOURL> or show this email to the front desk and enjoy. Check out our website, or give us a call for the latest schedule, events, and current specials!

Thank you for trying our yoga school and for taking the time to read this message. We wish you the best both in and outside of the hot room! If you have any questions, feedback, or suggestions, please feel free to reply to this email.

We look forward to seeing you!

The Crew at <STUDIONAME>

Web: <STUDIOURL>

Phone: <STUDIOPHONE>

*Incentive example: a discount on your Autopay membership, retail discount, buddy pass

6 Month No Return Email

<STUDIOLOGO>

Dear <CLIENTFIRSTNAME>,

We haven't seen you in a while, and we really miss you! A lot has changed around <STUDIONAME>, and we invite you to stop by for a special gift.

<INCENTIVE>*

Just show this email to the front desk or visit our online store and enter the Promo Code at the check out and enjoy! Check out our website, or give us a call for the latest schedule, events, and current specials.

Hope to see you soon!

The Crew at <STUDIONAME>

Web: <STUDIOURL>

Phone: <STUDIOPHONE>

*Incentive examples: a discount on retail, a complimentary drink after class, a buddy pass, a discount on a class card

***Start with general retention protocols for all students who have taken class and not returned. Pulling these reports once per month is an optimal frequency. Once you can effectively and consistently manage your general student retention, you may choose to add unique retention strategies for each individual pass that you offer as part of your pipelines.**

Individual Pass Retention:

Intro Retention:

- Create a specific pipeline for this pass
- Train your staff
- Actively pursue intro students
- Sell them on your product, their results, potential results, your community, the unique benefit / advantage that you offer
- Design an awesome pricing structure
- Have a low barrier of entry, high value pricing option for them (Autopay)
- Establish rapport with them
- Help them establish rapport with your community
- Contact students who did practice during their intro (a minimum number of times eg. 4) but who did not repurchase

How to find intro students who did practice a min number of times but did not repurchase in MB:

Step 1 – Find intro people:

Reports > Sales > General Sales > **Sales by Service** > Select desired time frame > Main Service Category > Pricing Option Intro Pass / Groupon > Tag New

Step 2 – Find students who practiced a min number of times:

Reports > Clients > Visits & Retention > **Attendance Analysis** > Same start date as step 1, end date at least 1 month more > check Tagged Clients Only > Analysis by Client > adjust min visits to 4 > Tag New

Step 3 – Remove students who did purchase something else:

Reports > Sales > General Sales > **Sales by Service** > same start date as step 1, change end date to current date > check Tagged Clients Only > Main Service Category > select ALL Pricing Options EXCEPT for intro / groupon, free passes, drop ins > Tag Remove (do not generate)

Step 4 – Create your list

Reports > Clients > Marketing > **Mailers & Data Exports** > check Tagged Clients Only > Generate or Export list

Membership (Autopay) Retention:

Additional to above

- “Wow” your members
- Offer surprise value to them at specific intervals. Examples: A free mini posture clinic / a half priced personal lesson / free branded shirt or mat **Note: this wow surprise value should be little to no cost to you. You should deliver it just before your standard drop off time – for most businesses at the 3 month mark – try to offer something that will enhance their practice
- Have a cancellation protocol – require a short questionnaire; ask if there is some way you can help them with their practice so they can better utilize their pass; offer a hold/freeze for 1 month instead of canceling; **Try to find out WHY they are canceling, try to get the real answer
- Have a cancellation offer – a discounted numbered pass (10 class pass), a free private lesson if they don’t cancel
- Call clients who still have a pass but have not been practicing. Highlight the benefits of your practice. Celebrate the successes they’ve already had. Try to personalize the message. Have an offer (1 free month / free mini posture clinic) ready to offer them in special cases. **Warning! Reminding students to come in to practice if they haven’t been after a long time may result in their cancellation. You may need to decide if this risk is okay for you.

To Find non practicing members (Autopay) in MB:

Step 1 – Find AP Members:

Reports > Payment Processing > **Autopay Summary** > select desired date range > Tag New

Step 2 – Find Non Practicing Members:

Reports > Clients > Marketing > **No Return** > check Tagged Clients Only > Tag New

Step 3 – Create your list

Reports > Clients > Marketing > **Mailers & Data Exports** > check Tagged Clients Only > Generate or Export list

Numbered Pass (eg. 10 class pass) Retention:

Additional to Above

- Be sure your number of sessions remaining email is rockin' and activated in MB – send this email 2 times eg. For a 10 class pass with 4 and with 2 times remaining.
- Include info and links to articles about practicing consistently over time (not focused on practice frequency)
- Once per month call / text students with only 1 class left who have not repurchased
- Once per month call students half way through their classes and “wow” them. Thank them for practicing with you and ask how their practice is going
- Create an upsell policy to get numbered pass students onto your Autopay by offering qualified students a special offer and the ability to switch
- Once per month contact students who have recently run out of classes but have not repurchased

To find sessions low clients in MB:

Step 1 – Find students with x number of visits remaining

Reports > Clients > Visits & Retention > **Session Remaining Low** > select desired date range > select desired # of visits remaining > Tag New

Step 2 – Create your list

Reports > Clients > Marketing > **Mailers & Data Exports** > check Tagged Clients Only > Generate or Export list

Promo Codes

Using promo codes is a great way to give your clients special offers, allow them to purchase online and easily track the efficacy of these offers. (Eg. Discounting a punch card and sending out a special email to students who did not purchase anything during their intro as part of your Intro Pipeline.)

To set up a promo code:

Step 1 – Log in under an owner or manager log in > go to manager tools > (pricing section) Promotions > click Add New >

Step 2 – Fill in appropriate information (*Remember to check the box “Allow for Online Sales”.)

Step 3 – To allow the discount to be applied to a specific package/item, under “Define Promotional Items Type” at the bottom, select “Individual Item” > search the product name > Add item > click Add

Send out promo code to those who are eligible for your offer. To track and report on promotions: Reports > Sales > Sales Analysis > Promotions