Playbook

Client Retention Playbook

Ten practical ways to keep clients coming back, with message templates and two numbers to track.

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Why retention comes first

A client who comes back costs you nothing to find. They already know how you work, you already know their home or their needs, and the job goes faster. Clients stay because of small habits repeated on every visit, more than because of any single programme.

This playbook has ten strategies, five message templates and a monthly checklist. Pick two or three strategies to start with, not all ten at once.

Measure it first

Two numbers tell you whether anything you try is working. You can count both from your calendar or client list once a month.

> **Rebooking rate** = clients with a future booking ÷ clients you served last month

> **Return rate** = new clients from three months ago who have booked again ÷ all new clients from that month

Write both down every month. The exact level matters less than the direction: if a change you made works, the numbers move.

1 Make the first visit easy to repeat

The first visit decides whether there is a second. Confirm the booking, arrive on time, and say at the start what you will do. At the end, show the result and ask whether anything should be different next time. Write the answer in the client's notes and act on it at the next visit.

2 Book the next visit before you leave

For a service that repeats, the easiest moment to book the next visit is at the end of this one. Ask a direct question with a date: "Same time in two weeks, Thursday the 14th?" A client who leaves without a next date has to remember to come back. Plenty of satisfied clients simply forget.

3 Confirm and remind

Send a confirmation when the booking is made and a reminder before the visit; the day before suits most services. Include the date, the time, the address and how to reschedule. A reminder helps the client who simply forgot, and an easy way to reschedule turns a likely no-show into a moved booking.

4 Follow up after the job

Send a short message one to three days after the visit and ask whether everything was as expected. It catches problems while you can still fix them, and it shows you care about the result after you have been paid. See template A.

5 Remember the details

Keep notes on every client: preferences, the dog's name, how to get in, the product they are allergic to. Read the notes before every visit. Clients notice when they don't have to repeat themselves, especially when someone new from your team comes for the first time.

6 Ask for reviews at the right moment

Ask when the client has just told you they are happy: in person at the end of the visit, or in reply to your follow-up message. Send a direct link to your review page so it takes one tap. See template B.

- Ask every client, not only the ones you expect to be happy. Google's review policies forbid asking selectively.
- Don't offer discounts or gifts in exchange for a review. Google and many other platforms forbid incentivised reviews, and in some countries it also breaks consumer law.
- Reply to every review. Reply to bad ones calmly and briefly, and offer to sort it out privately.

7 Keep the loyalty reward simple

A loyalty reward only works if a client can understand it in one sentence: "Every sixth visit is half price." "After ten visits, an add-on of your choice at no charge."

> **Work out the cost before you launch it.** Say you keep 30 per visit after costs, and the reward is worth 25 every sixth visit. That is about 4 per visit (25 ÷ 6). Ask yourself whether you would spend 4 per visit to keep this client. For a regular client the answer is usually yes.

Track rewards for each client in your records, so neither of you has to keep a paper card.

8 Offer a regular plan or a package

A standing booking (weekly, fortnightly, monthly) or a pack of sessions paid upfront makes coming back the default. Set the plan price with your cost formulas, not by guessing a discount. Put the terms in writing: how to pause, how to cancel, what

happens to sessions that are not used. Check the consumer rules on prepaid packages and expiry dates where you work.

9 Win back lapsed clients

Once a month, list the clients who have not booked for about twice their usual interval: a fortnightly client who has not been in for a month, say. Send each one a personal message, not a newsletter. See template D. Some will book again. Others will tell you why they stopped, which is just as useful.

Check what consent you need before sending messages like this where you work. Rules on marketing messages differ by country.

10 Handle complaints the same day

Clients judge you by how you handle a mistake as much as by the mistake itself. Reply the same day. Don't argue about details. Say what you will do, do it, then check with the client that it is fixed.

Write down every complaint and its cause. When the same cause comes up twice, change the process, not only the person.

Why clients leave

When a regular client stops booking, ask once, kindly, why. Sort the answers into groups: price, quality, timing or availability, they moved away, they no longer need the service. The first three are yours to work on. The last two are not, so don't count them against yourself.

Message templates

Replace the parts in brackets. Keep the messages short and send them from a person, not from "the team".

A. Follow-up after a visit

Hi [name], it's [your name] from [business]. How is everything after [service] on [day]? If anything isn't right, just reply here and I'll sort it out.

B. Review request

Thank you, [name], glad you're happy with it. If you have a minute, a short review helps other people find us: [link]. Either way, thank you for booking.

C. Reminder

Hi [name], a reminder of your [service] tomorrow, [date] at [time], at [address]. If you need to move it, reply here or use this link: [link].

D. Win-back

Hi [name], it's [your name] from [business]. It's been a while since your last [service]. Would you like me to find you a time in the next couple of weeks? And if something wasn't right last time, I'd really like to know.

E. After a complaint is fixed

Hi [name], I wanted to check that [the problem] is now sorted to your satisfaction. Thank you for telling us. We have changed [what you changed] so it doesn't happen again.

Monthly checklist

- [ ] Count the rebooking rate and the return rate, and write them down.
- [ ] List lapsed clients and send each one a personal message.
- [ ] Reply to every new review.
- [ ] Look through this month's complaints and their causes.
- [ ] Check which loyalty rewards are due and tell those clients.
- [ ] Pick one strategy from this playbook to improve next month.

Vorzi

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This guide is general information, not legal, tax or financial advice. Rules differ by country, so check the details with a professional where you work.

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