CUSTOMER FORM

Before you go

FE2

fe2.biz/essentials/#cancellation-and-win-back

Thanks for letting us know. Before we finish up, could one of these suit you better?

Name: Date:

Instead of cancelling, I'd like to:

- [ ] Pause for [length], then pick up where I left off
- [ ] Move to [lower option] and pay less
- [ ] No thanks, please cancel

What's the main reason you're leaving?

- [ ] Not getting enough out of it
- [ ] Too busy
- [ ] Money is tight
- [ ] Moving or too far
- [ ] Found somewhere else
- [ ] Something about a visit or the service
- [ ] Other: _____

Is there anything we could have done better?

- [ ] You can contact me if you make changes I might like

Template: add your business name and contact details. Cancelling never depends on filling this in.

Cancellation log

Record every cancellation, with the reason in the customer's own words. Win-back emails go at 30, 60 and 90 days; stop them if the customer comes back.

Business: Month: Owner:

Date	Customer (plan)	Reason, in their words	Offered pause or lower option?	Outcome (paused / changed / left)	Win-back 30	Win-back 60	Win-back 90	Came back?

Save offers and monthly review

One offer per reason, approved by finance, so every staff member makes the same offer for the same reason.

1 Save offers matched to the reason

Reason given	Offer to make (approved wording and end date)	Approved by finance?
Not getting enough out of it		☐
Too busy		☐
Money is tight		☐
Moving or too far	A warm goodbye, and an invitation to come back when nearby	☐
Found somewhere else		☐
Something about a visit or the service	Say sorry, pass it to the manager the same day, invite them back	☐

2 Monthly review (30 minutes, first Monday of the month)

Reason	How many this month	Accepted a pause or lower option	Our one fix

Monthly note to product and sales (one page)

This month: _____ customers cancelled. The top reasons were _____, _____ and _____.

In their words: "_____" and "_____"

What we're changing: _____ Owner: _____

What we need from you: _____