FE2 ESSENTIALS

One-hour setup checklist

FE2

fe2.biz/essentials/#one-hour-setup

Do these steps in one sitting. When you finish, you have an owner, a list and a starting line.

Business: Filled in by: Date:

1 Write down your starting line

Copy these from the front of your FE2 report.

From your report	Your figure
Retention score (out of 100)	
Estimated recoverable revenue a year	$
Priority 1 and its estimated cost	
Priority 2 and its estimated cost	
Priority 3 and its estimated cost	

2 Do the setup

- [ ] **Name your plan owner** and fill in the *Who does what* sheet. Allow them about two hours a week.
- [ ] **Give every leak a name.** Write an owner beside each leak on page 2 of *Who does what*, even if you won't start on it yet.
- [ ] **Book the Monday check-in** as a recurring 15-minute meeting for the next 13 weeks.
- [ ] **Build your customer list** in a shared spreadsheet, using the *Customer list* columns. Keep it in a shared drive with restricted access.
- [ ] **Count your real starting numbers.** Fill the list with last month's signups and write the counts on the *Weekly scorecard* before any email goes out. A hand count of your 50 most recent signups is fine to begin with.
- [ ] **Check your email tool.** Can it send automatically after signup, and to a filtered list? If not, send by hand from the *Email wording pack* for now.
- [ ] **Read the rules.** Check the one-page *Email and subscription rules* before the first email goes out.

Replace estimates first

Some figures in your report are marked **estimated** because the answer was "Don't know". Your first job is to swap them for real counts. The best comparison is always your own business last month.

FE2 ESSENTIALS

Who does what

FE2

fe2.biz/essentials/#who-does-what

Give every job one owner and one backup. In a small team, one person can hold several roles.

Business: Filled in by: Date:

Role	What they look after	Name	Hours a week	Backup
Plan owner	Runs this plan, the scorecard and the Monday check-in		about 2	
New signups	People who signed up but haven't finished setup or first visit			
First result	Customers who started but haven't had a real result yet			
Trials and quotes	Reminders before expiry, personal calls to interested people			
Payments	Failed payments, card updates, refunds (with finance)			
Renewals	Contacting customers 30 days before they renew			
Cancellations and win-back	Asking for one reason, inviting past customers back			
Emails	Setting up and checking the emails and templates			
Product or system changes	Whoever manages your product, website or booking system			
Finance	Pricing, extensions, refunds and payment rules			
Adviser	Legal questions, such as email and subscription rules			

The one rule

Every list in this plan (stalled setups, trials ending, failed payments, renewals) has exactly one named person who checks it each week. If a list has no owner, nobody calls.

Who does what: an owner for every leak

Write a name beside every leak in your report, even the ones you won't start yet.
Copy the estimated cost from your report.

Business: Filled in by: Date:

Leak	Report's estimated cost a year	Owner	Backup	Start in week	Notes
Trial or quote to paid	$				
Failed payments	$				
Cancellations and win-back	$				
Spotting at-risk customers	$				
Renewal and expansion	$				
Onboarding consistency	$				
Weekly health number	$				
Signup abandonment	$				
Getting started (activation)	$				
First result (time to first value)	$				

Your report lists your leaks from largest to smallest. Work on them in that order, one at a time.

Seven rules of keeping customers

Everything in your FE2 report comes back to these seven ideas. Pin this up, and come back to it whenever you're unsure what to do.

1 Customers decide early

The first days set the tone. Someone who gets a win early has a reason to stay.

2 One next step beats ten options

Choice feels generous, but it stalls people. Always make the next step obvious.

3 Silence is rarely a "no"

People get busy, confused or distracted. Most have simply stalled, and a kind nudge can restart them.

4 Someone must own it

When everyone looks after a stage, nobody does. Every leak needs one name beside it.

5 Automate the reminder, keep the relationship personal

Use email for the routine messages, and a real person for the moments that matter.

6 Ask, then listen

Your customers know exactly why they stalled or left. Their words are better than any guess.

7 What you count each week, you improve

A number seen every Monday gets attention. A number seen once a quarter gets excuses.

A word on honesty. Everything should feel like good service, never like a trick. Don't invent deadlines, hide the cancel button or make leaving hard.

Customer list

One line per customer. Start with last month's signups. Update it before each Monday check-in.

Business: Month: Updated by:

Name	Email / phone	Signup date	Finished setup? (Y/N)	First result date	Trial / quote ends	Paid? (Y/N)	Why stalled or left (their words)	Owner

Keep it simple. A tidy list that gets updated beats a clever system nobody opens. The "why stalled or left" column becomes the most valuable information you own.

Privacy. This list holds personal details. Keep it in a shared drive with restricted access, not on someone's desktop, and share it only with people who need it. The spreadsheet version is customer-list.xlsx.

FE2 ESSENTIALS

Weekly scorecard

FE2

fe2.biz/essentials/#weekly-scorecard

Each Monday, write last week's count in the column for that week. Fill in your real starting count in week 1, then reset the goals.

Business: Week 1 starts on: Scorecard owner:

Measure (people per week)	Report estimate	Real start	Goal by day 90	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12	Wk 13
New signups or new customers (total)																
Signed up, never finished setup or first visit																
Started, no first result yet																
Trials or quotes due this week																
Trials or quotes not converted																
Failed payments																
Payments recovered																
Renewals due / renewed																
Cancellations																
Past customers who came back																
At-risk customers flagged / contacted																

Monthly to weekly

Your report gives monthly counts. To get a weekly count, multiply by 12 and divide by 52. Example: 100 a month is about 23 a week.

How to read it

Look at the direction over three or four weeks, not one week. If signups grow, compare percentages (lost ÷ total) rather than counts.

When a number stalls

If a measure hasn't moved for four weeks, make it the first item at Monday's check-in and check the "If it isn't moving" advice in your report.

Goals are a suggested starting point, not industry benchmarks. A common first goal is 20 to 25% fewer lost customers by day 90. Reset goals once your real starting counts are in.

FE2 ESSENTIALS

Monday check-in

FE2

fe2.biz/essentials/#monday-check-in

Fifteen minutes, same time every Monday. Print one for each week, or keep one copy in a sleeve and write on a fresh sheet.

Date: Week number: Who attended:

1 Scorecard (3 minutes)

What moved the right way? What moved the wrong way?

2 The Monday lists (5 minutes)

List	How many	Owner	Done by
Signed up 7+ days ago, setup or first visit not done			
Started 7+ days ago, no first result			
Engaged trials or quotes ending within 7 days			
Failed payments not yet fixed			
Customers renewing in the next 30 days			
Customers showing a warning sign			

3 What customers told us (3 minutes)

Most common reasons from the follow-up log this week.

4 One thing to fix this week (3 minutes)

The fix	Owner	Done by

5 One win to share (1 minute)

Follow-up and reasons log

Write the reason in the customer's own words. At the end of each month, tally the top three and fix the most common one.

Business: Month: Logged by:

Date	Customer	Stage (setup, first result, trial, payment, renewal, cancel)	Reply (later / stuck / not for me / no reply)	Reason, in their words	What we did	Follow up on

This month's top three reasons

1. _____

2. _____

3. _____

The one we'll fix next month: _____ Owner: _____

Signup and getting-started trackers

Fill these in every Monday for four weeks to find your real numbers. Then compare them with the estimates in your report.

1 Signups: started vs finished

Your form tool, or whoever manages it, can give you the two counts. If not, compare your enquiry list with your new customer list.

Week starting	Started signup	Finished signup	Share finished (finished ÷ started)

2 Getting started

Count last week's new customers and how many logged in, finished setup or made their first visit. Owner of incomplete setups: _____

Week starting	New customers	Got started	Still to chase (names)

Why people stopped (from replies)

First-week result sheet

One row per new customer. Anyone still on "N" after 7 days gets the follow-up email or a quick call.

Business: Our first result: Owner:

Customer	Joined	Visits or sessions, days 1–7	Reached first result? (Y/N)	Followed up (date, who)	Notes

Email wording pack

Copy each email into your email tool and edit it to sound like you. Read it aloud: if it doesn't sound like you, change it. Replace everything in [square brackets].

Before you send: put your business name, contact details and an unsubscribe link in every nudge and reminder. Only mention an offer or a deadline that is real and approved by finance. Stop reminders once someone has done the step. See the *Email and subscription rules* checklist.

1. Getting new customers started

WITHIN AN HOUR OF SIGNUP

Subject: Welcome to [business name], here's your first step

Hi [first name],

Welcome! You're all set. To get going, there's just one thing to do: [one action], which takes about [X] minutes.

[Button: Start here]

Stuck on anything? Just reply and [owner's name] will help.
[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

DAY 3, ONLY IF THEY HAVEN'T STARTED

Subject: Need a hand getting started?

Hi [first name],

I noticed you haven't had a chance to [one action] yet. No pressure at all. It only takes a couple of minutes, and then you can [benefit].

If anything is confusing, just reply and I'll sort it out for you.

[Button: Pick up where you left off]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

DAY 7, ONLY IF THEY STILL HAVEN'T STARTED

Subject: Should I close your setup?

Hi [first name],

You signed up a week ago and haven't [finished setup / made your first visit] yet. If now isn't the right time, that's fine. If something went wrong, I'd like to fix it.

Could you reply with one word: **later**, **stuck** or **not for me**? Or I'm happy to help on a quick call or [in person].

[Owner's name], [Business name]

[Business name] · [contact details] · Unsubscribe

1 DAY AFTER SOMEONE STARTS SIGNING UP BUT DOESN'T FINISH

Subject: Your [business name] membership is nearly ready

Hi [first name],

You started signing up yesterday, and it looks like something got in the way. No worries. It only takes a minute to finish.

If something stopped you, such as a question about price, the minimum term or how payment works, just reply. A real person will get back to you.

[Button: Finish signing up]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

2. Getting to a first result

THE DAY THEY JOIN OR FINISH SETUP

Subject: Your first week at [business name]: 3 easy steps

Hi [first name],

Here's the quickest way to get your money's worth in your first week:

1. [Step 1]
2. [Step 2]
3. [Step 3, such as come back for a second visit before [date]]

Stuck on anything? Our quick how-to guides are here: [link].

[Button: See where to start]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

DAY 7, ONLY IF THEY HAVEN'T REACHED THE FIRST RESULT

Subject: Want a hand getting started, [first name]?

Hi [first name],

I noticed we haven't seen much of you yet. That's fine, and I'd love to help you get more from your [membership / account].

Reply and tell me what you're hoping for, and I'll suggest [three things to try / a quick walk-through].

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

DAY 14 AFTER JOINING

Subject: How are your first two weeks going, [first name]?

Hi [first name],

You joined [business name] two weeks ago. How's it going so far?

If you haven't had a chance to try [thing suggested at the welcome] yet, it's a good place to start. Just reply and tell me what you're enjoying or what's getting in the way.

[Button: Reply and tell us]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

3. Trials and quotes

3 DAYS BEFORE A TRIAL OR QUOTE ENDS

Subject: Your [business name] [trial / quote] ends on [day]

Hi [first name],

Your [trial / quote] ends on [end date], just 3 days from now.

If you've enjoyed it, [membership / going ahead] means [one or two real benefits]. [Only if finance has approved it: Join by [end date] and [offer].]

Not sure yet? Reply and tell me what's holding you back. It comes straight to me.

[Button: Join now]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

1 DAY BEFORE IT ENDS

Subject: Last day tomorrow, [first name]

Hi [first name],

Your [trial / quote] ends tomorrow. After that, [say what really happens].

Joining takes about [X] minutes. Our plan is [minimum term], then [what happens after]. Your payment is [how it's taken].

Got a question first? Reply and I'll answer today.

[Button: Join before it ends]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

WITHIN A DAY OF LEAVING CHECKOUT WITHOUT PAYING

Subject: Did something get in the way?

Hi [first name],

You got as far as the payment page for [plan] yesterday, and I wanted to check in. It may have been the price, a question or just bad timing.

Could you reply with one word? **Price** · **Questions** · **Later**

I'll come back to you personally.

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

BY HAND, TO KEEN PEOPLE WHOSE TRIAL OR QUOTE IS STILL OPEN

Subject: Good to see you back, [first name]

Hi [first name],

I noticed you've [been in [number] times / something true, such as asked about membership]. That's great to see.

If it would help, I can talk you through how [members / customers] get the most from their first week.

Is there anything you'd like to know before you decide?

[Button: See the options]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

LAST DAY, TO KEEN PEOPLE WHO HAVEN'T JOINED (ONLY IF YOUR EXTENSION RULE ALLOWS)

Subject: A few more days to decide

Hi [first name],

I know it's a decision, so I've added [X] days to your [trial / quote]. It now ends on [new date].

If you join, your plan is [minimum term], then [what happens after]. Your payment is [how it's taken].

Any questions at all, reply and I'll answer today.

[Button: Join now]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

4. Failed payments

THE DAY A PAYMENT FAILS

Subject: Your [business name] payment didn't go through

Hi [first name],

Your latest payment of $[amount] didn't go through. This happens a lot, often when a card has expired or been replaced. Nothing is wrong with your [membership / account].

You can fix it in about a minute. We'll also try the payment again on [date]. If you need a hand, just reply.

[Button: Update my card]

[Your name], [Business name]

[Business name] · [contact details]

DAY 3, ONLY IF STILL UNPAID

Subject: Still need to sort your payment, [first name]

Hi [first name],

A quick reminder that your payment of $[amount] is still outstanding.

If your bank may have blocked it, a quick call to them usually clears it up. Prefer to talk it through? Reply here or call [phone number].

[Button: Update my card]

[Your name], [Business name]

[Business name] · [contact details]

DAY 7, ONLY IF STILL UNPAID (DEADLINE CONFIRMED BY FINANCE)

Subject: Action needed by [date] to keep your [membership / account]

Hi [first name],

We still haven't been able to take your payment of $[amount]. To keep your [membership / account] active, we need it by [date].

If we don't receive it, [what happens next, as agreed with finance].

If something has changed and you'd like to talk about your options, reply and tell us.

[Button: Update my card]

[Your name], [Business name]

[Business name] · [contact details]

AFTER THE SECOND FAILURE, IF YOU CAN'T REACH THEM BY PHONE

Subject: Can I help with your [business name] payment?

Hi [first name],

It's [name] from [business name]. We've tried your payment of $[amount] twice now and it hasn't gone through. I'd hate for you to lose your spot over something so easy to fix.

If money is tight or your plans have changed, tell me. We can talk about [pausing your membership / other approved options]. Just reply or call [phone number].

[Button: Update my card]

[Your name], [Business name]

[Business name] · [contact details]

ABOUT 30 DAYS BEFORE A CARD ON FILE EXPIRES

Subject: Your card on file is about to expire

Hi [first name],

The card we use for your [membership / account] expires in [month]. Your next payment of $[amount] is due on [date].

To keep things running smoothly, please update your card before then. It takes about a minute. If you've already done it, thank you.

[Button: Update my card]

[Your name], [Business name]

[Business name] · [contact details]

5. At-risk customers and renewals

WHEN A CUSTOMER HASN'T VISITED OR LOGGED IN FOR [3 WEEKS]

Subject: We've missed you, [first name]

Hi [first name],

It's [staff name] from [business name]. I noticed we haven't seen you for a few weeks and wanted to say hello.

We have [something new] on now, and I'd love to hear what you'd like more of. If something hasn't been working for you, just reply and tell me. I read every message.

[Button: See what's new]

[Staff name], [Business name]

[Business name] · [contact details] · Unsubscribe

30 DAYS BEFORE A MINIMUM TERM OR RENEWAL

Subject: Your [business name] [membership / plan], [first name]

Hi [first name],

Your [minimum term / plan] ends on [date]. After that, [what happens, such as it moves to month to month at [price]].

Since you joined, you've [visits, results or usage, if known]. We'd love to hear what you've enjoyed most and what we could do better.

If life is getting busy, you can also [pause / change your plan]. If you'd like to cancel, you can do it here: [link].

[Button: Tell us how it's going]

[Staff name], [Business name]

[Business name] · [contact details] · Unsubscribe

6. Cancellations and win-back

AS SOON AS SOMEONE ASKS TO CANCEL

Subject: Before you go, can we try something else?

Hi [first name],

Thanks for letting us know. Before we finish up, here are two options that might suit you better:

• Pause for [length], then pick up where you left off.
• Move to [lower option] so you pay less while you use less.

If you'd still rather cancel, no hard feelings, and we'll do it straight away. Could you reply with the number that fits best?

1. Not getting enough out of it · 2. Too busy · 3. Money is tight · 4. Moving or too far · 5. Found somewhere else · 6. Something about a visit · 7. Other

[Button: Choose a pause or change]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

AFTER THEY CANCEL, IF THEY DIDN'T GIVE A REASON

Subject: Thanks for being with us

Hi [first name],

Your [membership / plan] has now ended, and you won't be charged again. Thank you for being part of [business name].

If you've got ten seconds, I'd love to know the main reason you left. Just reply with a word or two. There's no right answer.

You're always welcome back.

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

WIN-BACK 1: 30 DAYS AFTER THEY LEAVE

Subject: We've kept a spot for you

Hi [first name],

It's been about a month since you left [business name]. I hope things are going well.

If you'd like to come back, it's easy. [Offer or way back, only if approved.]

Not the right time? Just reply and tell me what would make it worth it.

[Button: Come back]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

WIN-BACK 2: 60 DAYS AFTER THEY LEAVE

Subject: What's new at [business name]

Hi [first name],

A quick update since you last visited: [one real thing that's new or fixed].

If you left because you weren't getting enough out of it, I'd love to help you get more. [Pop in / reply] and ask for [name].

[Button: See what's new]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

WIN-BACK 3: 90 DAYS AFTER THEY LEAVE

Subject: Still thinking about us?

Hi [first name],

This is my last note for now. If [a season or event] sounds like a good time to come back, we'd love to see you.

[Offer, only if approved, with a real end date.] Whatever you decide, thanks for being a customer.

[Button: Rejoin]

[Your name], [Business name]

[Business name] · [contact details] · Unsubscribe

Stop the win-back series for anyone who comes back. Only email past customers who agreed to hear from you.

Call scripts

Keep every call under three minutes. You're helping someone decide, not chasing a sale. Whoever is on shift should be able to use these.

Left checkout without paying

Open: "Hi [first name], it's [name] from [business]. I saw you were looking at [membership / plan] yesterday. Have you got a minute?"

Ask: "Was there anything that made you pause?" Then listen.

If it's price: "That's fair. Can I tell you what's included?" Don't offer a discount unless finance has approved it.

If it's a question: Answer it, then ask: "Would you like me to send the link again?"

If it's timing: "No worries at all. When should I check back?" Write the date down.

Keen trial or quote, still open

Open: "Hi [first name], it's [name] from [business]. I saw you've [been in a few times] and wanted to say thanks. Have you got a minute?"

Ask: "What have you enjoyed most?" Then: "Is there anything you'd want to know before deciding?"

If they're keen: "I can send the link now, and explain how the first week works."

If they're unsure: "What would make it an easy yes?" Write the answer down.

Signed up but hasn't started

Open: "Hi [first name], it's [name] from [business]. You signed up on [day] and I noticed you haven't [started] yet. Is now an OK time?"

Ask: "Did anything get in the way?" Write the reason in their words.

Help: "Would it help if I [walk you through it now / book your first session]?" Agree one next step and a date.

Started, but no first result yet

Open: "Hi [first name], I'm checking in to see how you're going with [product / membership]."

Ask: "Most people [reach first result] in about [X] days. What's the one thing that would make it easier?"

Help: Offer to do it together, now or at a set time.

Failed payment

Open: "Hi [first name], it's [name] from [business]. Your payment didn't go through, and I wanted to help sort it out. Have you got a minute?"

Ask: "Has your card changed recently, or is there anything else going on?" Then listen.

Help: "I can send you a link to update your card right now. It takes about a minute."

If money is tight: "We can [pause your membership] so you don't lose it." Mention a discount only if finance has approved one.

Call scripts

Checking in, renewals, cancellations and welcoming new customers.

Customer gone quiet (at risk)

Open: "Hi [first name], it's [name] from [business]. I noticed we haven't seen you in a little while and wanted to check in."

Ask: "Is there anything we could do better?" Then: "Have you tried [something new]? Come in this week and I'll show you."

Renewal chat (about 14 days before the term ends)

Open: "Hi [first name], your [minimum term / plan] ends on [date], so I wanted to check in."

Ask: "What have you enjoyed most? Is there anything you'd like more of?"

Offer: "If it's a busy stretch, we can pause instead of ending it." If they want to change or cancel, help them do it easily.

When someone wants to cancel

Open: "I saw you'd like to cancel. I'm sorry to see you go. Have you got a minute?"

Ask: "What's the main reason?" Then listen. Don't argue or explain.

Offer: Use the offer for that reason from your save-offers sheet: "Would a pause for [length] suit you better? Or we could move you to [lower option]."

If they still want to cancel: "That's completely fine. Thanks for telling me. You're always welcome back." Cancel it straight away and write the reason in the log.

Welcome chat with a new customer (about 10 minutes)

Welcome: "Welcome to [business], [name]. What are you hoping to get from [your membership / us]?"

Start: "Here are two or three things to try first. A good first week is [your first result]."

Book: "When are you planning to come back? I'll send you a quick note in two weeks to see how it's going."

Terms: "Your [minimum term / plan] runs to [date], and I'll check in with you before then."

Voicemail

"Hi [first name], it's [your name] from [business]. Just checking in about [reason], nothing urgent. I'll send you a quick email too. You can call me back on [number]."

Call log

One line per call. Copy each reason into your follow-up and reasons log at the end of the week.

Business: Week of: Caller:

Date	Customer and phone	Why calling	Answered? Voicemail?	What they said	Next step and date

GETTING STARTED

Welcome to [Business name]

FE2

fe2.biz/essentials/#getting-started-checklist

Your getting started checklist. Tick each step as you go. Most people finish in about [X] days.

Template: replace the text in [square brackets], then print it or send it as a PDF with your welcome email. Remove this line before sending.

1 [First step, such as: Log in and add your details]

[One sentence on how, and how long it takes.]

☐ Done

2 [Second step, such as: Book your first session]

[One sentence on how, and how long it takes.]

☐ Done

3 [Third step, such as: Choose your regular time]

[One sentence on how, and how long it takes.]

☐ Done

4 [Optional fourth step]

[One sentence on how, and how long it takes.]

☐ Done

Your first result: [name it, such as your first full class, first invoice sent or first treatment plan]

When you get here, you're up and running. Tell us how it went!

Need a hand?

Contact [name] on [phone] or [email]. We're available [hours]. No question is too small.

FE2 ESSENTIALS

First result worksheet

FE2

fe2.biz/essentials/#first-result-worksheet

People stay when they can see what they're paying for. Name the first result, check it with real customers, then shorten the path.

Business: Filled in by: Date:

1 Finish this sentence

"A new customer has got value from us when they have ..."

Examples

Type of business	A possible first result
Gym, studio, pilates or yoga	Attended three sessions in their first two weeks
Martial arts, dance or swim school	Finished their first full class and booked the next term
Dental	Completed their first check-up and booked the next appointment
Physio, chiro, osteo or podiatry	Attended their second appointment and has a treatment plan
Software or online service	Sent their first invoice, booking or report
Service business or call centre	Received their first completed job and confirmed they're happy

2 Check it with your three happiest customers

Ask: "What first made you think this was worth paying for?"

Customer	What they said, in their words	Matches our sentence? (Y/N)

3 Write the shortest path, in three steps or fewer

Step	What the customer does	Who helps
1		
2		
3		

4 Measure it

Typical days from signup to first result	Today	In 30 days	In 90 days

FE2 ESSENTIALS

Remove the hurdles worksheet

FE2

fe2.biz/essentials/#remove-the-hurdles

Part A: watch someone who has never used your business sign up. Say nothing, and write down every place they pause.

Business: Person observed: Date:

Step	Where they paused or got confused	What they said	Minutes taken

Questions to ask afterwards

- What was the hardest part?
- Was there anything you weren't sure about?
- What did you expect to happen next?

Remove the hurdles worksheet

Part B: list every step between "yes" and first result. Beside each, write what would break if you removed it or moved it to later.

#	Setup step	Needed right now? (Y/N)	What would break if we removed it or moved it later?	Keep / Move / Remove

Part C: changes to hand over

Describe the outcome you want. Give this list to whoever manages your product, website or booking system.

Change we want	Who will do it	By when	Done

Trial and quote tracker

FE2

fe2.biz/essentials/#trial-and-quote-tracker

One line per trial, free pass or quote. Each Monday, call the keen ones ending within 7 days. Follow up checkout drop-outs within a day.

Our definition of "keen"

For example: visited twice or more, clicked an email, asked a question or replied to you.

Our extension rule (agreed with finance)

For example: one extension only, [X] days, for keen people. Who can say yes: [one named person].

Name	Phone / email	Start	Ends	Reached checkout? (Y/N)	Keen? (Y/N)	Reminders sent (3-day, 1-day)	Followed up on	Extended to	Outcome (joined / lost)	What they said

Trial and quote tracker: weekly count

Each Monday, fill in last week's numbers. It takes about 10 minutes. Look at the trend, not one week.

Week starting	Trials or quotes that ended	Became customers	Didn't join	Main reason heard
Starting point				

What people told us

Tally each answer from emails and calls. After a few weeks, the biggest one is your main objection.

Answer	Tally	Total
Price		
Questions		
Later		
Other		

If "price" is the biggest, ask finance to compare your prices with two or three similar businesses nearby before changing anything.

Our goal

Didn't join each week: starting point _____ → goal by day 90 _____

FE2 ESSENTIALS

Objections and pricing page audit

FE2

fe2.biz/essentials/#objections-and-pricing

Use the reasons from your follow-up log and trial tracker. Answer each objection in plain words on your pricing page and in your emails.

Business: Filled in by: Date:

1 Your top five objections

Objection (such as price, timing, terms, not sure it's worth it)	Times heard	Our plain-language answer	On pricing page	In emails
1.			☐	☐
2.			☐	☐
3.			☐	☐
4.			☐	☐
5.			☐	☐

2 Audit your pricing page

Read it on your phone as if you'd never heard of your business. Each question should be answered in one plain sentence.

What a visitor wonders	Answered clearly on the page?	What we've heard from people	Fix, and who does it
What does it cost, and is anything paid up front?			
How long is the minimum term, if any?			
What happens after it? Does it renew, and at what price?			
What's included?			
How do I cancel or pause?			

Objections and pricing page audit

Test your pricing page on three people who don't know your business.

3 Three-person test

Question	Person 1	Person 2	Person 3
What do you think it costs, per week or month?			
What do you think is included?			
How long are you signing up for, and how would you cancel?			
What's confusing or missing?			

4 Changes to make

Change to the page or emails	Who does it	Checked by (finance / adviser)	Done

Price, plan and refund changes go to finance first, and ask your adviser to check how terms are worded. State the price, the term, what happens after it and how to cancel clearly, in one place, before people sign up.

FE2 ESSENTIALS

At-risk customers: warning signs and plays

FE2

fe2.biz/essentials/#at-risk-watchlist

Pick two warning signs you can already see. Write one play for each so any staff member can follow it within two days.

1 Our warning signs (tick two to start)

- [ ] No visit, booking or login in [3 weeks]
- [ ] A complaint or unhappy comment
- [ ] Visits or usage dropped by half compared with last month
- [ ] Minimum term or renewal ends within 60 days, with low use
- [ ] Says they "aren't getting much out of it"
- [ ] [Your own sign]: _____

2 What we do for each sign

Warning sign	What we do within 2 days	Who
No visit or login in [3 weeks]	Send a personal "we've missed you" message. Mention something new, and ask if anything has changed.	
Complaint or unhappy comment	Reply the same day. Fix what you can. Check back a week later.	
Low use and term ends soon	Move them into the renewal steps straight away.	
"Not getting much out of it"	Offer a quick walk-through of what they haven't tried. Offer a pause if life is busy.	

Find the real number

List customers who cancelled in the last 3 months. How many showed a warning sign first? _____ of _____. That's how many you could have seen coming.

At-risk customers: weekly health score

Give each customer a point for each "yes". 3 = fine. 2 = keep an eye on them. 0 or 1 = someone contacts them this week.

Business: Week of: Owner:

Our three questions (yes is good)

Q1: Visited or logged in within the last [14] days? Q2: Last payment went through? Q3: No complaints in the last 30 days? (Change them to suit you.)

Customer	Q1 (Y=1)	Q2 (Y=1)	Q3 (Y=1)	Score	Action	Contacted (date, who)	What they said

Failed payments: routine and tracking sheet

Many customers who "leave" never meant to. Their card expired or the bank said no. Follow up every failed payment, kindly.

The routine

- [ ] **Book 30 minutes with finance.** Open your billing system together and find the settings for failed payments.
- [ ] **Turn on automatic retries,** spaced a few days apart (for example day 3, 5 and 7) as a starting suggestion.
- [ ] **Turn on the failed-payment emails** and swap in the wording from the email pack (day 0, day 3, day 7).
- [ ] **Check the reply-to address** goes to an inbox a real person reads. Then test it with a card you know will fail.
- [ ] **After the second failure,** a named person calls within one working day, then emails if there's no answer.
- [ ] **Check twice a week** (for example Monday and Thursday). Owner: _____ Backup: _____

Customer	Date it failed	Plan and amount	Emails sent (day 0 / 3 / 7)	Called (date)	Fixed? (date)	Reason, if known

Failed payments: card-expiry check and monthly score

The easiest failed payment to fix is the one that never happens. Email customers about 30 days before their card expires.

1 Card-expiry check

Ask finance whether your payment provider can update replaced cards automatically, and whether your billing system can list cards expiring in the next two months. **Never write full card numbers:** last four digits only.

Customer	Card ends in (last 4)	Card expires (month/year)	Next payment due	Expiry email sent	Card updated? (Y/N)

2 Monthly score: recovered vs lost

On the first working day of each month, finance and the customer team fill this in together (about 20 minutes) and choose one thing to change.

Month	Payments that failed	Recovered	Lost (customer left)	Top reason	One thing to change

FE2 ESSENTIALS

Renewal timeline

FE2

fe2.biz/essentials/#renewal-planner

Your best moment to keep a customer is just before their minimum term or plan ends. Start 60 days out, not on the day.

When	What happens	Who
60 days before	Add the customer to the renewal planner. Check their use. Flag anyone on the at-risk list.	
45 days before	Prepare a quick results review: visits, sessions or results, and anything they've enjoyed.	
30 days before	Send the renewal email from the email pack, with the date, price and what happens next.	
14 days before	Personal call or chat. Ask what they've enjoyed and what they'd change.	
7 days before	If they're unsure, offer a pause or an offer finance has already approved.	
After the term ends	Record what they chose. Ask anyone who left for the main reason.	

Tie offers to use

A customer who uses you often could be offered a longer plan or a pack. A customer who rarely comes should be offered a pause, not a bigger plan.

Planning a price rise?

Decide the price with finance, give clear notice, explain what customers get for it, and ask your adviser to check the notice period and wording against each plan's terms.

Find the real number

Of customers whose term ended in the last 6 months: stayed _____ · moved to a rolling plan _____ · upgraded or bought more _____ · left _____

Renewal planner

List everyone renewing in the next 90 days, with an owner and a check-in date for each.

Business: Months covered: Owner:

Customer	Term ends	Owner	60 days: added	30 days: email sent	14 days: chat	Their results so far	Concerns	Outcome (stayed / changed / paused / left)

State the renewal price and term clearly, and make it easy to change or cancel. Any pricing or plan change goes to finance first.

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: _____

FE2 ESSENTIALS

Our onboarding standard

FE2

fe2.biz/essentials/#onboarding-standard

One page that says exactly what every new customer gets, when, and from whom. Cross out and rewrite the suggestions to suit you. Keep a printed copy at the front desk.

Business: Owner: Last updated:

When	What happens (suggestions in grey: rewrite to suit you)	How	Who	Done-check
Day 0 (joins)	Welcome email sent within an hour, with one next step. Getting started checklist handed over.			☐
First visit or first session	10-minute welcome chat (see call scripts). Show 2 or 3 things to start with. Note the minimum term end date.			☐
Day 3	Nudge anyone who hasn't started.			☐
Day 7	Check they reached the first result. Follow up anyone who hasn't.			☐
Day 14	Check-in email: how are your first two weeks going?			☐
Day 30	Check-in with one question: how is it going, and what would make it better?			☐
Monthly	20-minute review with the owner: who got the full checklist, what customers said, what to change.			☐
				☐

Our first result

_____

Find the real number

List customers who joined in the last 6 months, who welcomed them, and whether they still pay. If one person's customers stay more often, copy what they do.

FE2 ESSENTIALS

13-week action calendar

FE2

fe2.biz/essentials/#13-week-calendar

Copy each week's job from the calendar in your FE2 report. Reviews fall at the end of weeks 4, 9 and 13.

Business: Week 1 starts on: Plan owner:

Week	Phase	What to do	Report section	Owner	Done
1	Days 1–30				☐
2	Days 1–30				☐
3	Days 1–30				☐
4	Days 1–30				☐
5	Days 31–60				☐
6	Days 31–60				☐
7	Days 31–60				☐
8	Days 31–60				☐
9	Days 31–60				☐
10	Days 61–90				☐
11	Days 61–90				☐
12	Days 61–90				☐
13	Days 61–90				☐

End of week 4

30-day review. Real counts replace estimates.

End of week 9

60-day review. Fix what isn't moving.

End of week 13

90-day review. Choose the next leak.

30, 60 and 90-day reviews

Thirty minutes each. Compare with your real starting counts, not the report's estimates.

1 Day 30 review

Date: Who attended:

Measure	Real start	Day 30	Better / same / worse

What improved?

What didn't, and why do we think so?

Which estimates have we replaced with real counts? What will we change in the next 30 days?

2 Day 60 review

Date: Who attended:

Measure	Real start	Day 60	Better / same / worse

What improved?

What didn't, and why do we think so?

What will we stop, start or change? Who needs more help or time?

30, 60 and 90-day reviews

Day 90: what improved, what didn't, and which leak to take on next.

3 Day 90 review

Date: Who attended:

Measure	Real start	Day 90	Better / same / worse

What improved?

What didn't, and why do we think so?

What have we learned about why customers stay or leave?

Next quarter

Next leak to take on	Why this one	Owner	New goal

Email and subscription rules checklist

General information only, checked November 2026. It isn't legal advice: ask your adviser if you're unsure.

Marketing emails and texts (Spam Act 2003)

- [ ] **Consent.** We only send marketing emails or texts to people who agreed to hear from us, or where consent can reasonably be inferred. We never use bought or scraped lists.
- [ ] **Proof of consent.** We keep a record of who agreed, when and how. It is up to the sender to prove consent.
- [ ] **Identify.** Every message names our business and gives accurate contact details that stay correct for at least 30 days after sending.
- [ ] **Unsubscribe.** Every marketing message has a clear, free unsubscribe, with no login or extra details needed, that keeps working for at least 30 days.
- [ ] **Act on unsubscribes** within 5 working days, across every list and automated email.
- [ ] **"Factual" emails.** A reminder or notice that also promotes something, or links to an ad, counts as marketing. Our practical rule: business name and unsubscribe in every nudge and reminder.

Offers, deadlines and subscriptions

- [ ] **Real deadlines and offers only.** No invented urgency, no hidden cancel button.
- [ ] **Clear terms up front.** Price, any minimum term, renewal and how to cancel are stated plainly before sign-up, and mandatory fees are in the headline price.
- [ ] **Cancellation claims match the real terms.** If cancelling only takes effect at the end of a term, say so.
- [ ] **From 1 July 2027:** the Unfair Trading Practices Act 2026 adds strict rules on disclosure, reminders and cancellation for consumer subscriptions and for standard-form subscriptions with small businesses (under 100 staff or under $10 million turnover). If people can sign up online, they must be able to cancel online. Review your sign-up, reminder and cancellation steps now.
- [ ] **Lesson from eHarmony (August 2026).** The Federal Court found eHarmony misled consumers about pricing, auto-renewal and cancellation. Renewal terms shown in small print late in the purchase weren't enough.
- [ ] **Pricing, refund, pause and plan changes** go to finance. Legal questions go to your adviser.

Sources

ACMA, "Avoid sending spam" and the email and SMS unsubscribe rules fact sheet. Clayton Utz, "Australia's new Unfair Trading Practices Act explained" (Oct 2026) and "Federal Court finds eHarmony misled consumers" (Sep 2026). HWL Ebsworth on small-business coverage and online cancellation (Jul 2026). ACCC media release on the eHarmony judgment (Aug 2026).

Plain-English terms

The words used in your FE2 report and these templates, explained simply.

Leak
A point where customers or money quietly slip away, such as people who sign up and never come back.

Recoverable revenue
An estimate of the yearly income you could realistically win back by fixing your leaks. It's based on your own answers, not a guarantee.

Retention score
A score out of 100 from your assessment showing how well you keep customers. Higher is better.

Estimated
A figure that used cautious general numbers because the answer was "Don't know". Replace it with a real count.

Getting started (activation)
The first steps a new customer takes after saying yes, such as finishing setup or attending a first session.

First result (first value)
The first moment a customer gets real value from you, the point where they think "this is worth it".

Trial or quote to paid
How many trials, free passes, free accounts or quotes turn into paying customers.

Failed payment
A payment that didn't go through, often because a card expired. These customers often didn't mean to leave.

Renewal
When a customer's plan, membership or contract rolls over for another term.

Engaged
A trial or new customer who is clearly interested, by your own definition, such as visiting three times.

At-risk customer
A current customer showing a warning sign that they might leave soon.

Win-back
Inviting a past customer to return, usually after you've fixed the reason they left.

Expansion
An existing customer buying more from you, such as a longer plan or an extra service.

Health number or score
One simple figure that shows how well a customer, or all your customers, are doing.

Pause
Letting a customer stop for a set time instead of cancelling.

Scorecard
A short weekly table of counts that shows whether the work is paying off.

Monday list
The list each owner checks every Monday, such as people who signed up 7+ days ago and haven't started.

Whoever manages your product
The person or company that looks after your website, app, booking or payment system.