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.