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.