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.