

real YAN

RESULT H

If Clients Quit In The First 2 Months, You Don't Have A
Marketing Problem

**Activation &
Onboarding Self-Diagnosis**

For online coaches, consultants, and agencies **whose new clients bail fast**: use this activation check to see if the issue is your first win, your onboarding, or your expectations – and how to fix it in 4 weeks.

When clients cancel in the first 2 Months, your real problem isn't "more leads," it's activation: whether they hit a clear first win and feel guided in those first weeks. Businesses that keep people longest know exactly which early behaviours predict retention and design onboarding to drive every new customer to that activation point, then incentivize it.

This worksheet walks you through early vs late churn, your activation point, onboarding, early touch, and expectations so you can see why new clients are leaving and what to change first.

GOAL: Find out why new clients churn in the first 2 months and what to fix first.

INSTRUCTIONS:

- Use the last **3 months**.
- Answer, mark, then follow your type's plan.

SECTION 1 – Confirm It's An Activation Problem

Use one clear cohort: **clients who started in the last 6 months**.

(If you've only been selling this offer for <6 months, just use everyone.)

Q1. New clients who **started** in that period:

= _____

Q2. Of those, how many **cancelled or stopped paying within the first 2 months** of starting?

= _____

Q3. Of those, how many **cancelled after Day 60** (any time after the first 2 months)?

= _____

Early churn rate = $Q2 \div Q1 \times 100 =$ _____ %

Later churn rate = $Q3 \div Q1 \times 100 =$ _____ %

Q4. Is your early churn rate (first 60 days) clearly higher than your later churn rate?

- Yes → Mark: **"EARLY CHURN = HIGH"**

*Your main constraint is probably **Activation / Onboarding (Result H)** – clients are bailing before they ever get fully into the program.*

- No → Your main constraint is more likely **LTV / Ascension (Result I)** – people stay past onboarding, then leave later because the long-term journey/model isn't strong enough.

SECTION 2 – Do You Have A Defined “Activation Point”?

Activation point = “Every customer who does X or gets Y result, stays way longer than those who don’t.”

Q5. Can you clearly state your activation point?

Example:

- “Gym: attends 3 sessions in first 10 days”
- “Agency: client books 1 qualified appointment in first 14 days”

Write it:

Our activation point is: _____

- I have this, and it’s based on our actual data
- I’m guessing / I don’t know → Mark: **“NO CLEAR ACTIVATION POINT”**

Q6. What % of new clients hit that activation point in the first month?

Best estimate: _____ %

If < 70% → Mark: **“FEW HIT ACTIVATION”**

SECTION 3 – Onboarding Experience

Q7. Which best describes your onboarding for new clients?

- No real onboarding (we just give access / send a welcome email) → Mark: **“ONBOARDING = WEAK”**
- Generic doc / video only → Mark: **“ONBOARDING = WEAK”**
- Group onboarding call(s)
- 1:1 onboarding call(s) with checklist

Custom, personal, live onboarding beats generic, group, recorded. Some beats none.

Q8. Does your onboarding explicitly:

- Tell them *exactly* how to get value AND
- Show where to start AND
- Give them a simple “homework” task due in 7 days AND
- Schedule the next touchpoint AND
- Yes, all four
- Some → Mark: **“NO GUIDED FIRST WEEK”**
- Almost none → Mark: **“NO GUIDED FIRST WEEK”**

SECTION 4 – Engagement & Incentives In First Month

Q9. In the first month, how many proactive touches does a new client get from you / your team (DMs, calls, Looms, check-ins)?

- 0–1 → Mark: **“LOW EARLY TOUCH”**
- 2–4
- 5+

Q10. Do you reward or recognize clients for doing the behaviours that hit the activation point? (ex: shoutouts, badges, unlocks, access, bonuses)

- Yes, we incentivize activation
- Not really → Mark: **“NO ACTIVATION INCENTIVES”**

SECTION 5 – Expectations & Fit

Q11. Top reasons people give when they cancel in first 2 Months:
(check all that show up a lot)

- “Didn’t get results fast enough” → Mark: **“EXPECTATION / FIT ISSUE”**
- “Too much work / overwhelming”
- “Not what I thought I was buying” → Mark: **“EXPECTATION / FIT ISSUE”**
- “Life got busy / timing”

SECTION 6 – Your Activation Type

Type 1 – No Clear Activation Point

Marks:

- EARLY CHURN = HIGH
- NO CLEAR ACTIVATION POINT

Meaning: You don't know what "first win" keeps people.

4-Week Fix:

1. Pull a list of your longest-staying / happiest 10–20% of clients.
2. Ask: "What did they all do in the first 2 Months?"
3. Pick 1–3 common actions / results as your activation point.
4. Update onboarding to drive 100% of new clients to that point ASAP.

Type 2 – Weak Onboarding & Low Early Touch

Marks:

- ONBOARDING = WEAK or NO GUIDED FIRST WEEK
- LOW EARLY TOUCH
- FEW HIT ACTIVATION

Meaning: You sell them, then abandon them.

4-Week Fix:

1. Add a structured onboarding call (group or 1:1) with this agenda:
 - Resell the value
 - Show where to start
 - Give a 7-day homework that *hits activation*
 - Book next call / check-in

2. Commit to at least 1–2 proactive touches per week in first month.
3. Track: “% of new clients who hit activation in first 30 days.”

Type 3 – Expectation / Avatar Mismatch

Marks:

- EXPECTATION / FIT ISSUE
- Often “didn’t get results fast enough / not what I thought”

Meaning: You’re onboarding the wrong people, or promises don’t match the path.

4-Week Fix:

1. Re-aim your marketing at your best-fit, longest-staying customers only.
2. Update sales & onboarding to set **realistic** time-to-result, then design a Fast Win that matches it.
3. Make overpromising a fireable offense.

SECTION 7 – Your 4-Week Activation Plan

Have them write:

1. My activation type: 1 2 3
2. Our activation point is: _____
3. One onboarding change I’ll ship this week: _____
4. Target: “In 12 weeks, ___% of new clients will hit activation in a month.”

YOUR NEXT MOVE:

If You Fix The First Month, You Fix Your Churn (And Your LTV).

*Once you know whether you’re **Type 1 – No Clear Activation Point**, **Type 2 – Weak Onboarding & Low Early Touch**, or **Type 3 – Expectation / Avatar Mismatch**, you can engineer a first-month experience that makes the right clients stay far longer. That’s where most of the retention upside lives.*

*On a free 45-minute **Activation & Onboarding Deep Dive**, we’ll:*

- *Review your last 6 months of new clients and early churn*
- *Define or refine your real activation point based on your best-staying customers*
- *Map a 30-day onboarding plan to drive every new client to that activation point (touchpoints, homework, and incentives)*

👉 **[Click HERE to book your free 45-minute Activation & Onboarding Deep-Dive Call:](#)**

You'll leave with a clearer activation point, a better onboarding outline, and a target for what % of new clients should hit activation in the first month. If you want help building and installing your first-60-day activation & onboarding system over 12 weeks, I'll show you how we'd do that together.