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RESULT I

If Clients Leave After A Few Months, You're Leaving Most Of The Money On The Table

Retention & LTV Self-Diagnosis

For online coaches, consultants, and agencies who can get clients but can't keep or ascend them: use this self-diagnosis to see if your LTV problem is a thin back end, weak ongoing value, or no prepay/save plays – and pick the single best lever to pull next.

Winning once with a client is the hardest part. If they buy, get some value, then disappear or never upgrade, you don't have a "lead problem," you have a retention & LTV problem. Most businesses stop designing the journey after onboarding: no clear offer stack, no long-term path, no reactivation, and no way to monetize commitment. This worksheet walks you through your baseline LTV, churn, back end, reasons people leave, engagement, and pricing/term structure so you can see exactly why clients don't stay or ascend and which lever will move LTV fastest.

GOAL: Find out why clients don't stay or ascend, and pick the single best lever to increase LTV.

INSTRUCTIONS:

- Use the **last 12 months**.
- Answer honestly.
- Mark what applies.
- Then follow your type's plan.

SECTION 1 – Baseline LTV & Churn

Q1. Average gross profit per customer per month (Revenue per month – direct delivery cost)
= \$_____ / month

Q2. Average months a client stays (best estimate):
= _____ months

Lifetime Gross Profit (LTGP/LTV) ≈ Q1 × Q2 = \$_____

Q3. Rough annual churn rate (what % of customers leave in 12 months):
= _____ % *(If churn feels "high for your industry" or you don't know benchmarks, treat >25% annual churn as a red flag for most B2B / service models）*

If LTGP feels low compared to your price & effort → Mark: **"LTV = LOW"**

SECTION 2 – Do You Have An Offer Stack Or Just One Offer?

Q4. How many *paid* steps do you have after your core offer?
(check what exists *today*)

- □ Higher-ticket ascension offer (premium / elite / done-for-you)
- □ Lateral or cross-sell offers (related problems)

- □ Continuity / recurring offer (membership, retainer, subscription)
- □ Reactivation / winback campaigns to past clients

Count checked boxes: _____

If you checked **0–1** → Mark: **"BACKEND = THIN"**

Customer Journey/Offer Stack should include frontend, upsells/downsells, continuity.

SECTION 3 – Reason People Leave

From actual cancels / exits in last 12 months, what reasons come up most? (Check all that are common.)

- □ "Didn't get enough value for the price" → Mark: **"RETENTION = VALUE/USAGE ISSUE"**
- □ "I got what I needed / I'm done" → Mark: **"NO NEXT STEP"**
- □ "Too expensive right now / cash flow" (PRICING / TERMS = ISSUE)
- □ "Stopped using it / forgot about it" → Mark: **"RETENTION = VALUE/USAGE ISSUE"**
- □ "Switched to a competitor" (POSITIONING / AVATAR = OFF)
- □ "Life change / timing" (INVOLUNTARY CHURN)

Retention is mostly about: right avatar, clear activation, ongoing perceived value.

SECTION 4 – Engagement & Relationship

Q5. Do you have a simple, intentional *customer journey* beyond onboarding?
(e.g. milestones, unlocks, check-ins mapped over 12+ months)

- □ Yes, documented
- □ Kind of / in my head → Mark: **"NO LONG-TERM JOURNEY"**
- □ No → Mark: **"NO LONG-TERM JOURNEY"**

Q6. Do you run structured *follow-up / value / promo* campaigns to past customers at least quarterly?

- □ Yes, every quarter

- □ Sometimes → Mark: **"NO REACTIVATION SYSTEM"**

- □ Almost never → Mark: **"NO REACTIVATION SYSTEM"**

SECTION 5 – Pricing & Continuity

Q7. Do you offer an annual or multi-month prepay option for recurring services?

- □ Yes

- □ No → Mark: **"NO PREPAY / TERM OPTIONS"**

Q8. When someone is about to cancel a recurring offer, do you have a *save* process (call/video, downgrade, bonus to stay)?

- □ Yes

- □ No → Mark: **"NO SAVE PLAY"**

SECTION 6 – Your LTV Type

Type 1 – Thin Back End

Marks:

- BACK END = THIN

- LTV = LOW

- Many say "I got what I needed / I'm done"

Meaning: You sell them once and have nowhere for them to go.

4-Week Fix: Build a Simple Money Model Skeleton

1. **Design one ascension offer**: "More of / more help with what they just bought, faster, with less effort & risk, for more money."

2. **Design one continuity offer**: ongoing support / access / community they can stay in until they cancel.

3. **Add a quarterly reactivation promo** for past customers with a specific, time-bound offer.

Type 2 – Value / Usage Problem

Marks:

- RETENTION = VALUE/USAGE ISSUE

- NO LONG-TERM JOURNEY

Meaning: They join, then drift and stop caring.

4-Week Fix: Make Staying Obviously Valuable

1. Define your **top 10–20% best customers** and how they use you.

2. Build a simple journey with milestones and unlockables (extra calls, modules, events, badges) past key churn points.

3. Add a quarterly "customer appreciation / upgrade" event or offer to keep them engaged.

Type 3 – No Prepay, No Save, Leaking LTV

Marks:

- NO PREPAY / TERM OPTIONS

- NO SAVE PLAY

- LTV = LOW despite decent retention

Meaning: Customers might like you, but your model doesn't monetize commitment.

4-Week Fix: Monetize Commitment

1. Add **annual or multi-month prepay** with a clear bonus or discount.

2. Script a simple **cancellation call / video** that:

    - Re-sells the value,

    - Shows what they lose,

    - Offers downgrade or bonus to stay.

3. Track "save rate" on cancels for the next 3 months.

SECTION 7 – Your 12-Week LTV Plan

Write:

1. My LTV type: □ Thin Back End □ Value/Usage □ Prepay/Save Leak

2. LTGP today ≈ $. **Target in 12 months: $**.

3. One back-end / retention change I will ship in 4-weeks: _____

YOUR NEXT MOVE:

If You've Figured Out How To Get Clients, LTV Is Where The Real Money Is.

Once you know whether you're Type 1 – Thin Back End, Type 2 – Value / Usage Problem, or Type 3 – No Prepay / No Save, you can stop only chasing more leads and start making each client 2–5x more valuable instead. That's how you grow without adding more chaos.

On a free 45-minute Retention & LTV Deep Dive, we'll:

- *Review your current LTV, churn, and offer stack*
- *Identify whether your biggest upside is new back end offers, better long-term engagement, or monetizing commitment (prepay/save plays)*
- *Map a focused 12-week LTV plan: **one big back-end or ascension move, plus one supporting retention or reactivation play***

👉 **Click HERE to book your free 45-minute Retention & LTV Deep-Dive Call:**

*You'll leave with a clearer money model, a concrete LTV target, and the first change to ship in the next 4 weeks. If you want help **building and installing the first phase of your back end over 12 weeks**, I'll show you how we'd do that together.*