THE COMPANION WORKBOOK

WHY MEMBERS LEAVE

Twelve worksheets, plus your numbers, a 90-day plan and a monthly scorecard. Work through the book with real members, one decision at a time.

GOES WITH THE BOOK

This companion workbook goes with the book *Why Members Leave*. Get the book at **whymembersleave.com**

01 ATTENTION

02 CONNECTION

03 EXECUTION

04 EXTENSION

START HERE

HOW TO USE THIS WORKBOOK

One worksheet for every tool in the book, in the same order. Print the pages you need, or fill them in on screen. Not sure where to start? Worksheet 01 tells you what happened to the last person who left.

USE REAL NAMES.

Every worksheet is built around actual members, not averages. Start with one person.

WRITE WHAT THEY SAID.

Copy a member's words exactly. Put a question mark wherever you'd otherwise be guessing.

FINISH WITH A NAME AND A DATE.

Someone responsible and a day to check back. Without them, it's just a nice piece of paper.

KEEP IT IN ONE PLACE.

Each worksheet adds a line to the member record on page 22.

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CHAPTER 1 · THE GOODBYE BEFORE GOODBYE · DIAGNOSE

THE CANCELLATION REWIND

Start with what you know happened and work backward. In every row, keep what the member said separate from what you saw and what you still need to ask.

Member _____ **Date left** _____

REWIND POINT	WHAT THEY SAID	WHAT WE SAW	STILL TO ASK
1. The cancellation What did they say, and when?			
2. The first doubt When did staying become a question?			
3. The last useful moment When did we last help with something they cared about?			
4. The original goal What made joining feel worthwhile?			

"When did you first start wondering whether you'd keep going?"

Then ask: "What's the last thing you used from the membership that made a difference to your week?" Accept whatever answer they give, including "I can't think of one."

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CHAPTER 1 · PUT FIVE NAMES ON THE PAGE

FIVE NAMES ON THE PAGE

Use your five most recent voluntary departures, in order, so you include the person you barely remember. Put a question mark wherever you'd have to guess.

#	THEIR REASON, IN THEIR WORDS	THEIR ORIGINAL GOAL	BIGGEST GAP OR QUESTION
1			
2			
3			
4			
5			

Someone who stayed

Through the same awkward patch. What helped them pick things up again?

One decision this week

Written so someone else could carry it out.

Owner _____ **Review date** _____

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CHAPTER 2 · THE LEAK A MARKETING CAMPAIGN CAN HIDE · DIAGNOSE

THE COHORT STAIRCASE

Start with everyone who paid to join in one period, including people who have since left. Count how many of those same people kept paying at each step. Never add new joiners to this list.

Offer and intake

So someone else could rebuild the list.

First paid start date

Pauses and grace periods

The rule we'll use every time.

CHECKPOINT	STILL CONTINUOUSLY PAID	SHARE OF ORIGINAL GROUP	LEFT IN THIS INTERVAL
At entry		**100%**	—
Day 30			
Day 60			
Day 90			

Share = still paying ÷ number at entry. **Left in interval** = earlier count minus later count. If a count goes up, someone new slipped in: go back to the names.

What it cost

Per early leaver: what you spent to acquire them, minus what they paid after the cost of serving them.
× the number who left = $

I want to understand

What happened between ____ and ____ for these people, and who I'll talk to first.

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CHAPTER 2 · KNOW YOUR NUMBERS · DIAGNOSE

KNOW YOUR NUMBERS

Three numbers tell you what members leaving is costing you. Work them out for last month, then again every quarter. The number to beat is your own.

Members at the start of the month
Only people there on day one. New joiners aren't in either number.

_____ members

Of those, how many left
During the month, for any reason.

_____ members

Monthly churn rate

Left _____ ÷ start _____ = _____ %

Average stay
A rough guide. Your staircase shows the real shape.

1 ÷ churn rate _____ = _____ months

Lifetime value
What an average member leaves you over their whole stay.

Each month leaves you $_____ (price minus cost to serve) × _____ months = $_____

minus the cost to bring them in $_____ = **$_____**

If churn fell one point
Watch what keeping people a little longer is worth.

New churn _____ % → average stay _____ months → lifetime value $_____

That's $_____ more from every member.

QUARTER	MONTHLY CHURN RATE	AVERAGE STAY	LIFETIME VALUE
Last quarter			
This quarter			
Next quarter			

Selling six- or twelve-month programs? Track your renewal rate instead: of the members due to renew, the share who did (Chapter 10).

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CHAPTER 3 · THE SALE THAT WROTE THE CANCELLATION · ATTENTION

THE PROMISE PLAYBACK

Choose one promise a buyer could reasonably base a purchase on. Write your own prediction first, then ask three recent buyers separately, before you explain anything.

> *"Think back to the day you joined. What was the first thing you were hoping to bring us, and how did you picture getting help with it?"*

What we said

The exact words, where they appeared when the buyer paid.

My prediction

Before asking anyone.

Buyer 1 pictured

Buyer 2 pictured

Buyer 3 pictured

What actually happens

Checked from a member account, including when they're not selected.

The decision

Resource the promise, or change it. Owner and date.

Revised sales line

Matching welcome line

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CHAPTER 4 · YOU HAD ME AT MY FIRST WIN · CONNECTION

THE FIRST WIN PLAN

Plan one new member's first useful result: something they'd choose, can reach with the help you actually provide, and will know when it's done.

> *"What would you like help finishing this week?"*

Member and original goal

In their words.

Name the win

What they'll have finished, and by when.

Choose the action

What they'll do next, and how long it takes.

Provide the help

Who or what, how they get it, and when.

Check the result

The date, and what will show it happened.

Agree the next move

Where they'll use it next.

Restart step

One small action for a busy day.

Follow-up owner

CHECK THE ROUTE FIRST

- [ ] Opened the welcome email on a phone, as a new member
- [ ] The first link goes straight to the task
- [ ] Timed the task
- [ ] The example and help are where the email says

THEN FOLLOW UP

"Were you able to finish _____? If you got stuck, which part stopped you?"

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CHAPTER 5 · WHO KNOWS YOU'RE HERE? · CONNECTION

THE SECOND NAME TEST

Ask a member privately. If the answer is "Nobody yet" and they'd welcome it, plan one small, useful exchange with someone working on something similar.

> *"Besides me, who here would you feel comfortable asking for help?"*

Their answer

What they're working on now

Proposed peer, and why

Interest and format

Each person, asked separately: writing, voice note, or call.

What each can contribute

The first exchange, and when

e.g. "one paragraph each by Wednesday"

If the fit is wrong

How they can tell you privately.

Host and follow-up date

	THEIR ACCOUNT AFTERWARD	REACH OUT AGAIN?
Member one		
Member two		

Next step: continue / adjust / close

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CHAPTER 6 · THE SHINY DISCO BALL PROBLEM · EXECUTION

GIVE EVERY EVENT A JOB

List next month's calendar. For each event, finish the sentence "This will help a member do _____." If the honest answer is "They'll love the speaker," that's worth knowing.

EVENT THIS MONTH	THIS HELPS A MEMBER DO…	TIME IT ASKS (ATTEND + PREPARE + APPLY)	KEEP, CHANGE, OR MOVE?

"Everything's optional" only works if nothing else you send says otherwise.

Member or group this month is for _____

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CHAPTER 6 · REDESIGN ONE MONTH · EXECUTION

TEACH, APPLY, FINISH

Plan the month around one priority. Teaching helps them understand the task, applying turns it into a decision about their own work, and finishing gives them time to act with help nearby.

Destination

Where they want to be in a few months.

This month's focus

This week's next step

TEACH

The essential lesson or example.

APPLY

The decision, timing, and likely obstacle.

FINISH

Work time and the help available.

One session to change

And the explanation to send members.

Commitments to keep

For current members.

Route if they can't attend

Owner and review date

AT THE END OF THE MONTH

FINISHED THE AGREED ACTION	STILL WORKING ON IT	HAVEN'T HEARD FROM THEM

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CHAPTER 7 · THE WRONG ZOOM LINK · EXECUTION

THE TOUCHPOINT TALLY

Pick one task members do often. Follow it from the first instruction to the finish, with ordinary member access, on a phone. Rate each step from the member's side.

CLEAR
They know what to do and can do it.

COSTLY
They can, but must search, repeat, guess, or chase.

BLOCKED
They can't do it through the route provided.

Route reviewed _____ **Review date** _____

Intended result _____

#	TOUCHPOINT	TASK	WHAT HAPPENED (DATE OR SOURCE)	RATING	FIX NEEDED
1					
2					
3					
4					
5					
6					

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CHAPTER 7 · OWN IT. REPAIR IT. PREVENT IT. PROVE IT.

OWN IT. REPAIR IT.

Pick one fix using consequence, reach, and recurrence. Then work it through the four actions, each with an owner and a date.

CHOOSE THE FIX THAT MATTERS

PROBLEM	CONSEQUENCE: COST TO MEMBER	REACH: WHO, HOW OFTEN	RECURRENCE: AGAIN?

TURN IT INTO A REPAIR

OWN IT

Who acknowledges it and coordinates the response?

REPAIR IT

What helps the members already affected?

PREVENT IT

What source or process will change?

PROVE IT

What task will we repeat, and what result shows it works?

FAILED PAYMENTS CHECK

- [ ] The first notice arrives before access is cut, in plain words
- [ ] A member can update their card in one step, on a phone
- [ ] There's a grace period, and the member knows how long
- [ ] Someone sends a personal note when a card isn't updated
- [ ] Failed payments are reported separately from people who chose to leave

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CHAPTER 8 · QUIET IS A TERRIBLE CHURN SCORE · EXECUTION

THE QUIET MEMBER MATRIX

Choose five members: one active, one quiet, one who's changed, one you haven't heard from, and one you think you understand well.

	PROGRESS EVIDENT	PROGRESS UNCLEAR
ACTIVE	ACTIVE + PROGRESSING **LEARN** Find out what's helping and what matters next.	ACTIVE + UNCLEAR **CLARIFY** Ask what value they're getting and where they need help.
QUIET	QUIET + PROGRESSING **RESPECT** Support the approach that works for them.	QUIET + UNCLEAR **RECONNECT** Ask about their goal. Fill the gap or remove the obstacle.

Review period _____ **"Active" means** _____

#	THEIR GOAL	LATEST UPDATE, DATE, SOURCE	SEEN: OFTEN / RARELY	PROGRESS: EVIDENT / UNCLEAR	ACTION	OWNER, DATE
1						
2						
3						
4						
5						

Check-in: remember their goal, ask what happened, offer one next step. If you owe them something, start there.

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CHAPTER 9 · SUCCESS HAS A SHORT MEMORY · EXECUTION

THE PROGRESS RECEIPT

A short, dated record of what has changed for one member, checked with them. Bring in what's already in their record and only ask for what's missing.

Member _____ **Review date** _____

START

Their goal and starting point. Mark recollections as recollections.

SHIFT

What's different now, with an example and a date.

SIGNIFICANCE

Why it matters, in their words.

SUPPORT: what helped

Including their own effort and help from elsewhere.

SUPPORT: still needed

SUPPORT: who, what, when

MEMBER CHECK

What did they confirm or correct?

> *"I wanted to capture what's changed since you started. Does this sound right? What have I missed?"*

A receipt is allowed to say "not yet," "this didn't help," and "we need to change something." It isn't a testimonial request.

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CHAPTER 10 · THE MEMBER WHO DOESN'T NEED YOU ANYMORE · EXTENSION

THE RENEWAL RUNWAY

Use it at a milestone, a change in circumstances, or ahead of a renewal. For annual memberships, start about eight weeks before the decision deadline. Work through it in order.

Member or group _____ **Owner** _____

Prompted by _____ **Deadline** _____

PROGRESS

What brought them here, what's changed, what's unresolved?

PRIORITY

What matters now, in their words?

FIT

Which existing support fits? Can they use it? Limits?

PLAN: decision

Continue / change option / finish / undecided.

PLAN: their first action

PLAN: our commitment

Review date

Ask: "What would make the next few months feel worthwhile?" · "What's got harder now that you've made this progress?" · "Is this still something you want to spend time and money on?"

Amount _____ **Renewal date** _____ **Term** _____

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CHAPTER 11 · LEAVE THE DOOR OPEN · EXTENSION

THE EXIT SORT

Confirm the cancellation first, then sort. The categories are for investigation, not verdicts, and the member's words always stay beside your interpretation.

DELIVERY	FIT	CIRCUMSTANCES	COMPLETION	UNKNOWN
The promise or experience fell short.	The offer doesn't suit them right now.	Something outside changed.	They got what they came for.	We don't know yet.

Member and tenure

Request / confirmed / access ends

Their reason

In their own words.

Categories

More than one may apply.

Said / verified / unknown

Remedy owed

Owner and date.

Change for others

Owner and date.

How we'll know it worked

Future contact preference

After confirming, ask: "If you're open to sharing, what most influenced your decision to leave? A sentence is plenty, and replying is completely optional."

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CHAPTER 11 · TURN DEPARTURES INTO A WORKING REVIEW

THE MONTHLY REVIEW

Once a month, look across recent departures. Keep the numbers in proportion, say how many people replied, and leave with one issue, one owner and one date.

MEMBER	THEIR WORDS	CATEGORY	STAGE	CARD FAILURE?	EVIDENCE

What repeats?

One issue to fix

Owner and date.

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CLOSING · THE 30-DAY FIX · ACT

THE 30-DAY TEST

You're not proving the business has been transformed. You're finding out whether one specific change helps members get what they came for.

One group. One problem. One change. One owner. One review date.

WHEN	QUESTION	YOUR NOTES
WEEK 1 CHOOSE	**Which group, and what problem can you observe?** Evidence so far, and what you don't know. What result, at what cost, would justify keeping it?	
WEEK 2 CHANGE	**The one change, and why it should help.** "If we..., then...". Owner, launch and review dates. Tested on a phone from a member account?	
WEEK 3 WATCH	**What are members doing with it?** What are they still asking? What contradicts what you expected? What has it cost the team?	
WEEK 4 DECIDE	**Keep, Adjust, or Stop. Why?** Include missing or contrary evidence. Next action, owner, date. Later review for the long-term result.	

Keep: useful and sustainable, so name who maintains it. **Adjust**: the idea works, so name the next fix and review date. **Stop**: it didn't help enough, so keep your existing commitments while you try something better.

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CLOSING · YOUR FIRST 90 DAYS · ACT

YOUR FIRST 90 DAYS

One test is a great start. Here's how the first three months build on each other. After that, it's one test and one scorecard review a month.

MONTH	WHAT YOU'LL DO	DONE BY, AND WHAT YOU FOUND
Month 1 Diagnose	Rewind your last five cancellations (Worksheet 01), build one Cohort Staircase (Worksheet 02) and work out your churn rate and average stay (page 6). Circle the biggest drop.	
Month 2 Test	Run your first 30-Day Retention Test (Worksheet 12) on the problem at that drop, using the chapter that matches the member's question. Start your monthly scorecard (page 21).	
Month 3 Decide and repeat	Keep, Adjust or Stop. Then choose your next test from what you learned. Usually the next step down the staircase.	

The biggest drop we found

Between day ____ and day ____ for which group?

The question it points to

Is this what I bought? · Do I belong here? · Is it working? · Is it still worth it?

Our first test

The one change, and the chapter it comes from.

Owner

One name.

Monthly review day

The same meeting, every month.

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CLOSING · MONTHLY RETENTION SCORECARD · ACT

MONTHLY RETENTION SCORECARD

Bring these six numbers to the same meeting every month. You don't need special software. And with small numbers, read the names, not the percentages.

NUMBER	MONTH	MONTH	MONTH
New members with a first win by day 7 Are new members getting started? · First Win Plan (Ch 4)			
New members who can name a second person by day 30 Are they finding their people? · Second Name Test (Ch 5)			
Time to a useful reply on a help request Are we answering what matters? · The Closing			
Failed payments recovered Are we losing people who never chose to leave? · Touchpoint Tally (Ch 7)			
Day-30 and day-90 retention for each group When are people leaving? · Cohort Staircase (Ch 2)			
This month's departures by Exit Sort category Why are they leaving? · Exit Sort (Ch 11)			

This month's decision

One clear decision, from the numbers above.

Owner and review date

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APPENDIX · ONE PAGE PER MEMBER

THE MEMBER RECORD

Every worksheet adds a line here. Keep one per member where your team already keeps notes. Date every entry, and keep what the member said apart from what you assumed.

Member _____ **Joined** _____ **Intake** _____

Original goal

In their words. (01, 04)

What they expected

When they paid. (03)

First win

Agreed, date, what happened. (04)

Second name

And any introduction. (05)

Current priority

And next action. (06)

Open issues we owe

Owner and date. (07)

Matrix position

As of date. (08)

Latest Progress Receipt

(09)

Renewal Runway

And decision. (10)

Contact preferences

If they leave

Words, category, remedy. (11)

Next action

Owner and date.

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Reopen your last cancellation email. What would you ask that member now?

THE BOOK

11 CHAPTERS. 12 TOOLS.

This workbook goes with my book, *Why Members Leave*. Had a win with the book or this workbook? Kept a member you thought you'd lost? Let me know at **hello@clintsalter.com**. I'd love to hear about it.

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