Why

MEMBERS



LEAVE

The quiet reasons people quit,
and what keeps them.

CLINT SALTER

ABOUT THE EXAMPLES

The members you'll meet in this book, like Sophie, Ben, Marcus and the Thursday clinic regulars, are made up, and so are the worked numbers. They're there to show you how the tools work, not to report client results. When a story is mine, I'll tell you. Every script and email in these pages is a starting point, so make it sound like you and fit the membership you run.

DOWNLOAD YOUR FREE WORKBOOK

Every chapter in this book ends with action steps, and the full worksheets for each one are in the companion workbook. Download it free at **whymembersleaveworkbook.com**, print it out and keep it next to you as you read.

WHERE THIS MATERIAL COMES FROM

RetentionCode and the tools in this book are my own work. They draw on my advisory work with membership owners since my most recent business sale, my own research, and lessons from businesses I ran, including the dance studio I opened at sixteen. They don't use or describe the systems, materials, data, or confidential information of any business I've sold. Where I draw on client work, I've left out or changed anything that could identify the client.

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Would you like me to speak to your group of clients or team? Would you like me to be a guest on your podcast? Email **hello@clintsalter.com**. I'd love to hear from you.

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AFTER THEY SAY YES

I once read a cancellation email from a member who said she didn't have time.

I believed her. She ran a business, had a young family and was doing most things herself. So I sent a warm reply saying I understood, and that she'd be welcome back when things settled down.

Then I went back and read her very first message to us.

She'd joined because she was working every evening. She wanted her team to take on more so she could finish work, go home and actually *be* home.

Hang on. The lack of time wasn't new. It was the reason she'd paid us!

So I looked at what we'd sent her since she joined. A welcome email, a training library and a calendar full of calls. Lots of useful stuff. But to get any help, she first had to find the right training, watch it, work out what applied to her and decide where to start.

We'd given a woman who was already drowning in decisions… another set of decisions to make.

And my reply was already sitting in her inbox. *Come back when things settle down.* Ouch. She'd come to us for help settling them.

That email changed how I think about retention, and it's the reason this book exists. Here's what I learned:

Members don't leave when they cancel. They leave when the promise stops showing up in their week.

This book is about finding that moment, and making sure the next member never reaches it.

HELLO, MEMBERSHIP OWNER!

I'm so glad you're here. I have a real soft spot for people who build a business around teaching others. You start with something you're good at, somebody asks if you can show them how, and a few years later you have a recurring Zoom link, a team to pay and surprisingly strong opinions about microphones!

Somewhere along the way, a person you may never have met pulled out their credit card and decided to give you a go. This book is about what happens to that person next.

Let me ask you a question. If I joined your membership tomorrow, who would be excited? You would, I'm sure. Someone might send me a lovely welcome email. If I happened to be member number one hundred, I might even get a celebration I'd done absolutely nothing to deserve.

Now, imagine I'm still here six months later. **Who could tell me what's changed for me because I stayed?**

That's the question this whole book is built around.

A LITTLE ABOUT ME

I opened my first business at sixteen. It was a dance studio, in a tiny community hall, and I was far better at teaching a class than at working out what it cost me to run one. (A few meltdowns on the bathroom floor taught me that lesson!)

Since then I've built and sold five companies, and three of them were membership businesses. My last business was Dance Studio Owners Association (DSOA), a network of more than 50,000 dance studios around the world, serving over a million students every week. We had more than 750 studio owners in our

high-ticket membership program alone. I sold it to private equity in 2022 and stepped down as CEO at the end of 2024.

For the past two years, my advisory work has focused on one thing: retention. I sit down with founders who care deeply about their members and ask a question that feels very personal when your name is on the door. *Why are people leaving something you've put so much of yourself into?*

Now, I love bringing in new members as much as the next founder. But I've learned that reading twenty emails from people who left can save you from spending your next marketing budget filling the same leaky bucket.

WHY RETENTION IS WHERE THE MONEY IS

Let's talk numbers for a moment, and I'll keep them easy.

Let's look at two of the memberships you'll meet in this book. The **Business Ignite Collective** is a $100-a-month community for service-business owners who are starting and growing. **Systems That Scale** is a $1,500-a-month program for owners ready to grow with a team, with group coaching and live events.

	BUSINESS IGNITE COLLECTIVE: $100 A MONTH	SYSTEMS THAT SCALE: $1,500 A MONTH
Cost to serve each month	$30	$600 (events, coaching, your team's time)
Cost to bring them in	$140 (ads)	$3,000 (ads, sales calls, launches and webinars)
What each month leaves you	$70	$900

	BUSINESS IGNITE COLLECTIVE: $100 A MONTH	SYSTEMS THAT SCALE: $1,500 A MONTH
When you break even	During month two	During month four
What six months leaves you	$280	$2,400

See the pattern? The premium member is worth far more, but you're also far further behind on day one. If they leave in month three, you've *lost* money on someone who loved your sales call, your sales page or your invitation.

At any price, the sale is the same whether that member stays one month or twelve. What changes everything is how long they stay. If you're only keeping people long enough to earn back what it cost to find them, you're working very hard for very little.

And there's a human cost too. If you're the one constantly finding new members to replace the ones quietly slipping out the back door, you'll feel it. And if you have a team, they'll feel it too. It's the Sunday you meant to have off but spent rewriting a webinar because enrollment opens on Monday. Sound familiar?

THE GOOD NEWS

For most of the founders I work with, members aren't leaving because of AI, the economy or some big shift in the market. They're leaving because the promise that brought them in isn't showing up in their week.

Which is great news, because that you can fix!

Your members trusted you enough to pay you. That's an advantage you'll never have with a stranger scrolling past your ad. Every week, you get to show them what your word is worth. If you say they'll get feedback by Friday, they'll have formed an opinion about your business by Friday afternoon.

Try this. Look at your calendar for your next launch or member acquisition campaign. I bet there's a date for every email, a person for every call and a meeting to review the results. Now ask, "What should happen for a new member by the end of week two?" Usually the answer is a little vaguer. "Well, they have access to everything." They do! But what did you hope they'd be able to *do* by then?

WHY THIS BOOK IS DIFFERENT

Most books about keeping customers are written for software companies. Dashboards, onboarding flows, customer success teams. All useful stuff! But your members didn't sign up for a login. They signed up because they trust you to help them change something, and every week they're checking whether it's happening.

So we're not starting with a dashboard. We're starting with the four questions your members are asking, in the order they ask them, and one practical tool for each. If you teach, coach or bring people together for a living, I wrote this for you.

WHO THIS BOOK IS FOR

Why Members Leave is for membership owners, community founders, coaches and educators who want to understand why paying members leave, and build an experience that gives them a reason to stay.

It's for you if you run:

- **A paid membership or community**, like a professional network, an interest group or subscription education
- **A recurring coaching or training program**, like group coaching, a mastermind or an ongoing training membership

You already have paying members. You've watched engagement fade and cancellations eat into your growth. And you want practical ways to help members take part, make progress and keep seeing the value of what they bought. You're in the right place.

Got a Team? Bring Them Along!

If you've grown beyond being a solo founder, this book is just as much for your team as it is for you. The people answering support emails, hosting calls and welcoming new members are the ones members experience every week.

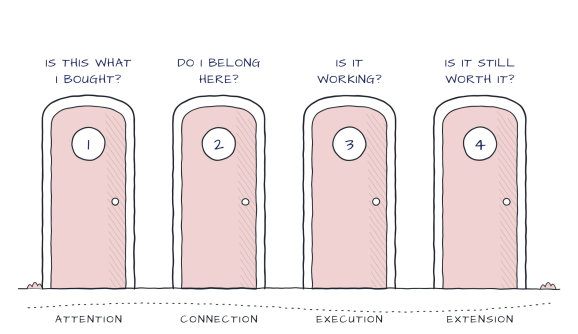
Many of my advisory clients run seven- and eight-figure businesses, and it's their teams, not the founders, who put these systems to work day to day. So share the book. Work through the action steps together in your team meetings. Give each tool an owner. Retention gets much easier when it's everyone's job, not just yours.

Throughout the book, look for the **At Scale** boxes. In them, you'll follow **Marcus**, who runs Systems That Scale. He has 600 members, eight coaches and a small sales team. His boxes show what changes when you have hundreds or thousands of members, and who on your team owns each tool.

THE FOUR QUESTIONS EVERY MEMBER IS ASKING

Here's the big idea the whole book is built on. Every paying member is quietly asking four questions, in this order:

1. IS THIS WHAT I BOUGHT?
2. DO I BELONG HERE?
3. IS IT WORKING?
4. IS IT STILL WORTH IT?



When one of those questions goes unanswered for long enough, the member starts to leave. Usually weeks before they tell you.

I call my system for answering them **RetentionCode**. It has four phases, one for each question:

- **Attention:** making sure the promise matches what they get
- **Connection:** getting new members started and helping them find their people
- **Execution:** helping them make progress, and see it
- **Extension:** making continuing worth it

Before the four phases come two chapters that help you diagnose what's going wrong. After them, the Closing helps you act on it. You'll see how it all fits on the map.

HOW TO USE THIS BOOK

We'll work through it in three parts:

- **Diagnose (Chapters 1 and 2).** Find out which question your members are stuck on.
- **The four phases (Chapters 3 to 11).** Answer each question in the order your members live them.
- **Act (the Closing).** Choose one thing and fix it in 30 days.

Not sure where to start? Read Chapters 1 and 2 first. They'll show you which question your members are stuck on, and that tells you which chapter to read next. The map on the next page shows where everything sits, so you can jump straight there.

A quick note if your members sign up for six or twelve months at a time. Wherever I say "before their next payment comes out", read it as "before their renewal decision". The questions are exactly the same. You just have longer to answer them, and longer to get it wrong without noticing!

Every chapter teaches one tool and finishes with **Your Action Steps** and a **Quick Recap**. The full worksheets are in the free companion workbook, which you can download at **whymembersleaveworkbook.com**. Grab it now, before you start Chapter 1. My advice? Don't just read this book. Do the action steps. Reading about retention won't keep a single member, but doing one action step this week might.

And one more thing. Not every goodbye is a bad one. If someone leaves to care for a parent, or because they got exactly what they came for, wish them well and celebrate it. The departures I want to help you with are the ones where there was still something worthwhile for that person to do with you, and somewhere along the way, they lost faith that it would happen.

BEFORE YOU TURN THE PAGE

Think of one person who joined in the last month. Finish this sentence about them:

By the time their next payment comes out, I'd love them to have _____.

Make it something they'd notice in their own life. And if you're not sure what goes in that blank? You've just found a lovely reason to get in touch with them.

That's the business I want to help you build. One where you can look forward to welcoming the next hundred members, because you know what happened to the last hundred.

Let's get started!

Clint

RETENTIONCODE AT A GLANCE

THE BIG IDEA

Here's the whole book on one page! The four questions sit in the middle, in the order members ask them. Before them are two chapters that help you find which question your members are stuck on. And at the end, the Closing helps you fix one thing this month. Come back to this page whenever you need the right tool for the problem in front of you.

PHASE	THE MEMBER'S QUESTION	CHAPTERS AND TOOLS
Diagnose	Which question is going unanswered, and when?	1 The Goodbye Before Goodbye: Cancellation Rewind 2 The Leak a Marketing Campaign Can Hide: Cohort Staircase
Attention	Is this what I bought?	3 The Sale That Wrote the Cancellation: Promise Playback
Connection	Do I belong here?	4 You Had Me at My First Win: First Win Plan 5 Who Knows You're Here?: Second Name Test
Execution	Is it working?	6 The Shiny Disco Ball Problem: Teach, Apply, Finish 7 The Wrong Zoom Link: Touchpoint Tally 8 Quiet Is a Terrible Churn Score: Quiet Member Matrix 9 Success Has a Short Memory: Progress Receipt
Extension	Is it still worth it?	10 The Member Who Doesn't Need You Anymore: Renewal Runway 11 Leave the Door Open: Exit Sort
Act	Where do I start on Monday?	Closing, The 30-Day Fix: 30-Day Retention Test

You don't have to read it in order:

- **Members leaving in their first month?** Start with Chapters 2 and 4.
- **Long-standing members drifting away?** Start with Chapters 9 and 10.
- **Just want to know why the last person left?** Start with Chapter 1.

THE MEMBERS

MEET THE MEMBERS

These are the members you'll follow through the book. They're made up, but you've almost certainly met someone like each of them. You'll meet three memberships, each for service-business owners at a different stage:

- **The Business Ignite Collective** ($100 a month) is for owners starting and growing a service business. Every Thursday, members bring whatever they're stuck on to a live clinic. Most of the members below belong here.
- **Systems That Scale** ($1,500 a month) is Marcus's program for owners ready to grow with a team, with group coaching and live events.
- **The Agency Owner Mastermind** ($3,000 a month) is a small group for established agency owners, like Ben.

If you lose track of who's who, come back to this page.

MEMBER	WHO THEY ARE	CHAPTERS
Sophie	A graphic designer, nervous about pricing her first big proposal.	3 to 10, Closing
Mel	An electrician who misses one session and quietly leaves.	1, 11, Closing
Anna	A mechanic who gets what she came for, then leaves to care for her mom.	1, 11
Jess	A wedding photographer who waits twelve days for an answer.	1, 8, 9
Leah	A chiropractor who becomes Sophie's "second name", then outgrows the beginner sessions.	1, 5, 8, 10
Daniel	A dentist pricing a new service, who can't get into Thursday's clinic.	4, 7
Priya	A hairdresser renting her first chair, working out what to charge.	4, 5, 8
Ben	An agency owner in the Agency Owner Mastermind who wants a week off.	4, 6, 8, 10
Marcus	The founder of Systems That Scale, with 600 members and eight coaches.	At Scale boxes
Tom and Rosa	A bookkeeper in a professional network, and a Spanish learner.	5, 9
Grace	The team member who hosts the clinics and working sessions.	5, 9

DIAGNOSE

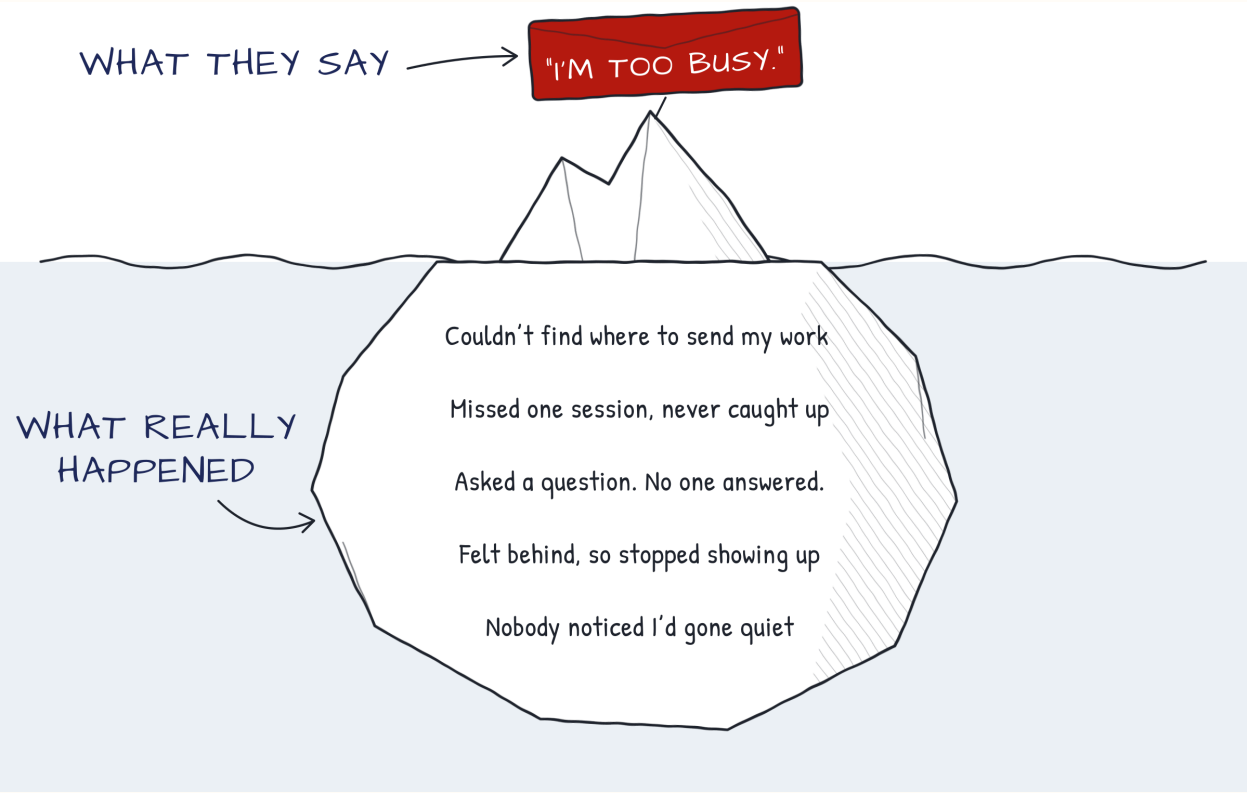
THE GOODBYE BEFORE GOODBYE

THE BIG IDEA

Members don't decide to leave on the day they cancel. They decide weeks earlier (or months, if they're on a twelve-month commitment). The cancellation email is just the day they get around to telling you.

IN THIS CHAPTER, YOU'LL LEARN

- Why "I'm too busy" is almost never the whole story
- The Cancellation Rewind: four questions that show you when a member really decided to leave
- How to ask a member why they left without making it awkward
- A 30-minute exercise you can do this week with your last five cancellations



"Things are a little busy right now, so I'm going to cancel. Thanks for everything."

Sound familiar? I've read hundreds of these emails over the years. Some even come with a little heart at the end, which is lovely, but it doesn't tell you much!

Remember the email I told you about at the start of the book? The member said she didn't have time. What she really meant was that she'd stopped seeing the point. And I didn't find that out until it was far too late to help her.

If you take one thing from this chapter, make it this. The day the email arrives is not the day they decided. It's the day they told you. The real decision happened somewhere in the weeks before, and that's where we're going to look.

SAME WORDS, TWO VERY DIFFERENT STORIES

Let me introduce you to Anna and Mel. They're both members of the Business Ignite Collective, a $100-a-month community for people starting and growing a service business. Every Thursday, members bring whatever they're stuck on, like a quote, a price or a marketing post, and get feedback from a coach.

Anna runs her own mechanic's workshop. She joined because she was losing every Sunday afternoon to paperwork: quotes, invoices and parts orders. By her third Thursday, she had a simple weekly admin routine she could get through on a Friday afternoon. That Sunday, she left the paperwork alone and took the kids out for ice cream. Win!

Then Anna's mom had a fall. Thursdays became hospital appointments, and Sundays became cooking for two households. When her next payment came around, she looked at her week and made a sensible decision. She wrote, "Things are a little busy right now."

Mel is an electrician. She joined because a builder had asked her to quote on the biggest job she'd ever priced: wiring a whole new medical center. She loved her first Thursday. Then a site meeting got moved, and Mel missed the second session, the one where she'd planned to get feedback on her quote.

On Friday she opened your email. The recording was there. But she couldn't see anywhere to send her quote so someone would look at it. So she sent it to the builder as it was, crossed her fingers, and got busy with the work. A few weeks later, she wrote, "Things are a little busy right now."

Same words. And in your spreadsheet, the same reason: *time*.

But are they the same? Not even close.

Anna got exactly what she came for. Then life happened. That's a good goodbye, and it deserves a warm send-off.

Mel never got what she came for. She got stuck, nobody noticed, and she quietly gave up. That's the one you can fix.

Now imagine you took that spreadsheet to your team meeting. Two members left because of "time", so you decide to shorten the Thursday calls. Would that have kept Anna? No, she'd still be at the hospital with her mom. Would it have kept Mel? No, she'd still have nowhere to send her quote.

So when someone tells you they're busy, believe them. Then find out what "busy" meant for their experience with you.

THE CANCELLATION REWIND

So how do you find out what really happened? I use a simple tool I call the **Cancellation Rewind**. You start with the cancellation and work backwards through four questions.

1 **What did they say?**

Copy their exact words. Don't squash them into a dropdown option like "time commitment". "I can't keep spending this much time trying to work out which calls to go to" tells you far more than "time" ever will.

2 **When did they first start to wonder?**

Most members can tell you the moment continuing became a question. It might be a date, or it might be "around the time the Tuesday group stopped". Either one is worth knowing.

3 **When did we last help them?**

Ask about the last thing they used from your membership that actually made a difference to their week. This one often surprises you. And if they say "I can't think of anything", that tells you something too.

4 **Why did they join in the first place?**

Go back to their very first message, sales call or welcome form. "Grow my business" doesn't give you much to work with. "I want my Sundays back" gives you a person, a problem and a way to know if you've helped.

Here's a little tip. Wherever you don't know an answer, write a question mark rather than a guess. It's amazing how quickly a guess in a team chat turns into a "fact" in your cancellation report!

Let's Rewind Mel

QUESTION	WHAT WE KNOW ABOUT MEL
What did she say?	"Things are a little busy right now."
When did she first wonder?	? (She missed the second Thursday.)
When did we last help her?	? (She came to the first pricing session.)
Why did she join?	Help pricing her biggest job yet.

Look at all those question marks. You don't know enough to redesign your whole program. But you do know enough to ask Mel a good question.

So you ask. And Mel replies: "I guess I started wondering when I couldn't make that second session. Is there actually somewhere to send work if you miss a Thursday? I did look."

Now you've got a job you can do this week. Open your Friday email on your phone and try to send in a quote like a member would. If the link is hiding three clicks

deep under “Additional Resources”, move it into the email and tell members when they’ll hear back. If there isn’t a way to send work outside the live call, decide whether you can offer one. And if live feedback is all your price allows, say so clearly before the next person joins.

Then reply to Mel: “You looked in the right place. We gave you the recording and never told you how to get feedback after a missed session. I’m sorry that left you stuck.” No pitch, no discount. Just honesty.

TALK TO SOMEONE WHO STAYED

Here’s a step most owners skip. Find a member who went through the same tricky patch and is *still here*. They can often tell you something the person who left never got the chance to learn.

Meet Jess, a wedding photographer. Like Mel, she missed the Thursday session she’d planned around. Unlike Mel, she renewed. So ask her, “What did you do with your new packages when you couldn’t make Thursday?”

She might say:

- **“I sent it to Leah. We got chatting on the first call.”** Two members worked out how to help each other. Could you make that introduction happen earlier for the next member?
- **“I’d done a few of those before, so I was fine.”** An experienced member can miss a session. A first-timer with a deadline can’t. Now you know who needs the backup plan.
- **“Oh… I still haven’t sent it.”** Jess loves the group and fully intends to come back, but the thing she joined to finish is sitting in her drafts. You’ve just found someone you can help this week!

If it's just you running the membership, I promise fifteen minutes with Jess will tell you more than a whole weekend rebuilding your onboarding.

HOW TO ASK WITHOUT MAKING IT AWKWARD

This is where a good intention can turn into a not-so-great experience. The member writes to cancel, and the owner replies, "Of course! Could we just jump on a quick call first?"

Read that from the member's side. They've asked you to stop charging them, and you've sent them a meeting invite!

My rule? **Cancel first, then ask one question.** Confirm what happens to their billing and access. Then, if there's something you genuinely don't know, ask one thing. And if someone has told you they're caring for a sick parent, don't ask anything at all. Just wish them well.

Here's the kind of note I'd send to Mel:

EMAIL TEMPLATE

Hi Mel, I've canceled your membership as requested. You'll have access until Friday, and there won't be another payment. I remember you joined with a big quote you wanted feedback on. If you have a minute, when did you first start wondering whether you'd keep going? A line or two is plenty. And it's completely fine to leave it there. Thanks for spending part of your week with us. Clint

Two quick tips:

- **If you say it's optional, mean it.** Three reminders to fill in your "optional" exit survey takes the shine off the word!
- **If the answer stings, don't defend yourself.** Don't explain that the coach was away or the link was in the welcome email. Write it down, say thank you, and give yourself the afternoon before you decide what to change.

We'll build out your whole goodbye process in Chapter 11, and we'll check back in with Mel when we do.

AT SCALE

with Marcus · Systems That Scale

Marcus gets about 25 cancellations a month. He doesn't Rewind them all, and you don't need to either. Each month, his client success lead picks ten: every member who left in their first 30 days, plus a few from the groups he's most worried about. An AI assistant pulls the four answers out of the records, and she reads them all in one sitting. In her first month, three of the ten said almost the same thing: they'd never spoken to their coach. That one pattern told Marcus more than a hundred cancellation forms marked "time".

YOUR ACTION STEPS

Block out 30 minutes in your calendar over the next week. Not while you're answering emails or waiting in the school pick-up line. Proper, uninterrupted time.

1 **Grab your last five cancellations**

Take them in order, so you include the person you barely remember as well as the one whose email you could recite word for word.

2 **Rewind each one**

Answer the four questions using what you already have: welcome forms, support messages, dates and their cancellation note. One sentence each. Question marks where you're unsure.

3 **Look for the gaps**

Can you answer question four, "why did they join?", for most of them? If not, that's your first fix. Add this to your welcome form: *"What's happening in your business this week that made you decide to join?"* Then make sure the people running your program can see the answer.

4 **Send one note**

Pick one person where there's a genuine question you'd love answered. Use the email above as your template.

5 **Talk to one person who stayed**

Ask, "When you came back after that week away, what helped you pick things up again?"

6 **Choose one small fix for this week**

Write it so someone else could do it. "Improve engagement" isn't a job. "Put the feedback link next to the recording in Friday's email" is. Add a name and a date to check it worked. If you're a team of one, that name is yours!

QUICK RECAP

- The cancellation email is the day they told you, not the day they decided.
- The same reason (“I’m busy”) can hide completely different stories. Some are good goodbyes. Some are problems you can fix.
- The Cancellation Rewind asks four questions: What did they say? When did they first wonder? When did we last help? Why did they join?
- Members who stayed are your secret weapon. Ask them what helped.
- Cancel first, then ask one question. Never make leaving hard.

In the next chapter, we’ll zoom out from one member to a whole group. You’ll learn how to spot exactly *when* members are leaving, so you know where to look first.

DIAGNOSE

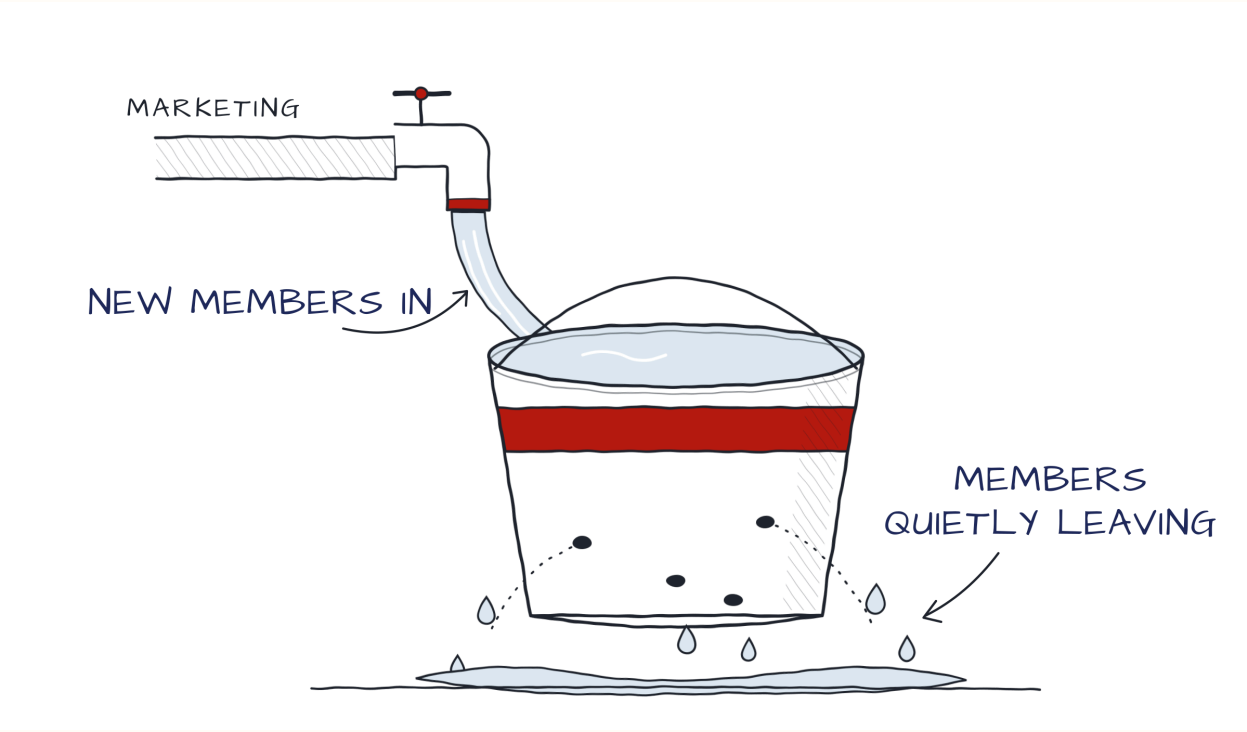
THE LEAK A MARKETING CAMPAIGN CAN HIDE

THE BIG IDEA

A successful launch or member acquisition campaign can hide the members quietly leaving out the back door. To see them, stop looking at your total and start tracking each group of joiners on their own.

IN THIS CHAPTER, YOU'LL LEARN

- Why your total member number can lie to you
- The Cohort Staircase: a simple picture that shows *when* members leave
- What to do with the names behind the numbers
- How to compare groups fairly, even small ones



Twenty-five new members! You close enrollment, send the welcome email and head out for dinner. You've earned it.

On Monday morning, you open your billing report. You started January with 100 paying members, including 40 people who had just joined. Now, after your February campaign, you're at 117. Growth!

But hang on. Let's do some quick math. If you had 100 and added 25, why aren't you at 125?

Because 8 of those 40 January joiners have already left. All in their first month.

So which number gets mentioned at dinner? The 25 who joined. And which number should change what you do on Monday morning? The 8 who left.

WHAT THOSE 8 MEMBERS COST YOU

Let's use the Business Ignite Collective from the Introduction: $100 a month, $30 to serve each member and $140 to bring each one in.

Each of those 8 people paid you once and left you $70 out of pocket. That's $560 spent on people who never paid back what it cost to find them. If they'd stayed six months, each would have contributed $280 instead, or $2,240 for all eight. Add the $560 you're already out of pocket, and that's a $2,800 gap from one intake.

And none of it shows up on your campaign report.

MY OWN WAKE-UP CALL

I learned this one the uncomfortable way.

After one big campaign, I really thought we'd worked out how to grow. The campaign had smashed it. New members were posting introductions, the team was welcoming everyone, and our total was the highest it had ever been. I was ready to write it all down so we could do it again.

Then we pulled up the list of people from the campaign *before*.

I recognized the names. People who'd posted excited introductions. People we'd welcomed with open arms just a few weeks earlier. And next to a lot of those names, the billing status said: canceled.

I'd seen those cancellations come in one at a time. A few here, a few there, each with a perfectly reasonable explanation. But seeing them together, as a group, was

a completely different feeling. A big chunk of our shiny new campaign was simply replacing the people we'd just spent money bringing in.

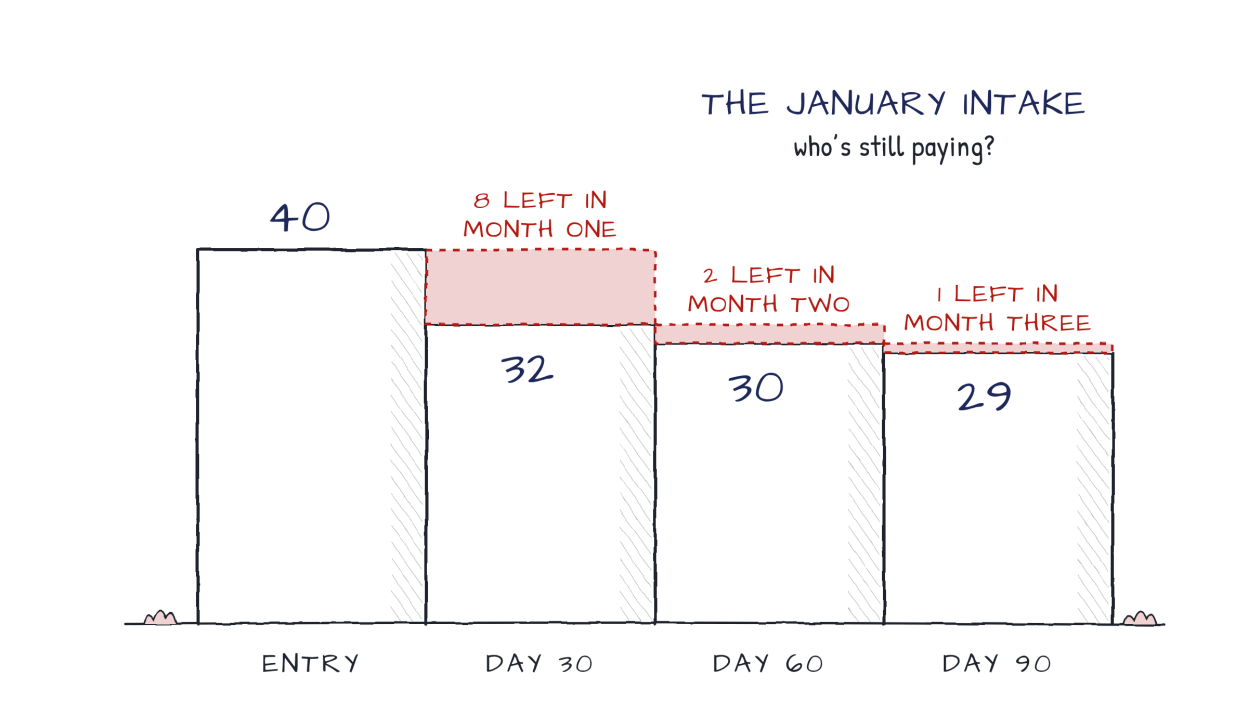
The worst part? I'd been about to repeat the whole thing without ever looking at what happened after the sale.

THE COHORT STAIRCASE

So how do you spot the leak? You build what I call a **Cohort Staircase**.

A cohort is just a group of people who started at the same time. It might be the 40 people in your January intake, or the 7 who joined in March. The staircase shows how many of that original group are still paying as time goes on.

Here's the January group:



January intake. Each step shows how many of the original 40 are still paying.

Look at that first step. It's a big one! Of the 11 people who left in the first 90 days, 8 left in the first month. After that, things settle right down.

Now, if all you knew was "11 people left over three months", you might picture a slow, steady trickle. You might decide to book a monthly guest expert to keep things fresh. But look at the staircase. Most of the people you wanted to help would be gone before your second guest even showed up!

That's why I love this picture. It doesn't tell you *why* people left. But it tells you exactly *where* to look. Instead of asking your team to "work on retention", you can say, "Let's look at what the first 30 days felt like for those 40 people." That's a job someone can do.

The One Mistake to Avoid

There's an easy way to get this wrong. If you pull up your *current* members and sort them by join date, you'll miss the very people you most want to learn about. They're not on the list anymore!

So always start with everyone who *joined*, including the ones who've since left. Your payment records or enrollment list will have them. And never sneak new joiners into an old group, however tempting it is when you like the number better. Give them their own staircase.

PUT THE NAMES BACK IN

Once you've spotted the big step, close the chart. It's done its job. Now go and look at the actual people.

Say you go through the records for those 8 January members and find:

- **5 asked to leave.** Two mention feedback, one says client work dried up and two gave no reason.
- **2 lost access because their payment failed.** They never chose to leave at all!
- **1 got exactly what she came for.** She priced one project, sent the proposal and left happy.

Each of these needs something different. The happy member deserves a high five, not a win-back campaign. The two failed payments need someone to check the payment process (more on that in Chapter 7). And the five who asked to leave? That's where you dig in.

Here's a tip. Even when two people give the same reason, check they mean the same thing. One member wrote, "I needed an answer by Friday." Another wrote, "I thought someone would mark up my whole proposal." Both said "feedback". But one is about *speed* and the other is about *what she thought she was buying*. Make every reply faster and you could still disappoint the second member, just more quickly!

COMPARE APPLES WITH APPLES

Now, a quick word of warning about comparing groups.

Say your February group is at 92% after 30 days and January is at 72.5%. Wow, huge improvement! Except January has had 90 days to leave and February has only had 30. That's not a fair fight.

Compare the same step instead. January at day 30 was 80% (32 of 40). February at day 30 is 92% (23 of 25). Still a nice improvement, but less dramatic. And in a group of 25, one person is 4 percentage points, so don't throw a party just yet.

Two more quick rules:

- **If you changed something, check what else changed too.** Did February come from a trusted partner while January came from ads? Did the price change? That might explain more than your new welcome call.
- **With small groups, read the names, not the percentage.** One person leaving out of 7 looks scary in big red numbers. But if they moved overseas and the other six are thriving, there's nothing to fix!

KNOW YOUR NUMBERS

The staircase shows you *when* members leave. Three more numbers tell you what it's costing you. I'll keep the math easy, I promise.

Monthly churn rate. "Churn" just means members leaving. To work out your rate, take the members who left this month and divide by the members you had at the start of the month. Only count people who were there on day one. Anyone who joined during the month isn't in either number.

For example, you start March with 120 members and 9 of them leave. That's 9 ÷ 120 = 7.5%.

Average stay. For a rough idea of how long a typical member stays, divide 1 by your monthly churn rate. At 7.5%, that's 1 ÷ 0.075, or about 13 months. It's only a guide, because early leavers and long stayers get averaged together. Your staircase shows you the real shape.

Lifetime value. This is what an average member leaves you over their whole stay, minus what it cost to bring them in. For the Business Ignite Collective, that's $70 a month × 13 months = $910, minus $140 = $770 per member.

Now watch what happens when you keep people a little longer. Bring churn down from 7.5% to 5%, and the average stay goes from about 13 months to 20. Lifetime

value jumps from $770 to $1,260. That's $490 more from every member, without touching your price or spending another cent on marketing!

So what's a "good" churn rate? I'm not going to give you a number to aim for, and I'd be wary of anyone who does. It depends on your price, your contract length and what you promise. A $30 monthly community and a twelve-month coaching program simply aren't comparable. The number to beat is your own:

- Compare this quarter with last quarter.
- Compare each group of joiners at the same step.
- If you sell annual programs, track your renewal rate instead (there's a simple way to count it in Chapter 10).

We'll turn these into a short monthly scorecard in the Closing.

AT SCALE

with Marcus · Systems That Scale

Marcus enrolls in two launches a year, so each launch is a cohort and his staircases line up neatly. (If your members join every day, group them by the month they joined.) His billing export does the counting. The surprise came when his team split the spring cohort by how people had found them. Members who came from a partner's webinar stayed far longer than members who came from ads. Same program, same coaches. Once you have more than about 50 people in a group, try splitting it the same way. And whoever owns the staircase still reads the names behind the biggest drop.

YOUR ACTION STEPS

You need a list of joiners, the date each person's paid access started and ended, and a piece of paper. That's it!

1 **Choose one group**

Write a sentence someone else could use to recreate your list. For example, "Everyone who made their first payment for the monthly coaching membership in January." Pick a group that's had at least 90 days.

2 **Count the steps**

Write the original number first. Then count how many of *those same people* are still paying at day 30, day 60 and day 90. If a number goes *up*, someone new has snuck in. Go back to the names!

3 **Circle the biggest drop**

Then finish this sentence: "I want to understand what happened between day ___ and day ___ for these people."

4 **Look at the names behind that drop**

Sort them into: chose to leave, payment failed, and got what they came for.

5 **Book one hour to dig in**

Pick one person who left for a Cancellation Rewind (Chapter 1), and one person from the same group who stayed. Put it in your calendar now.

QUICK RECAP

- Your total member number can grow while you're quietly losing new members.
- A Cohort Staircase tracks one group of joiners over time and shows you *when* they leave.
- Always start with everyone who joined, not just who's still here.
- Behind every drop is a list of names. Sort them before you try to fix anything.
- Compare groups at the same step, and with small groups, trust the names over the percentages.

So, you know *when* your members are leaving. In the next chapter, we'll look at one of the most common reasons they leave early: they didn't get what they thought they were buying.

ATTENTION · IS THIS WHAT I BOUGHT?

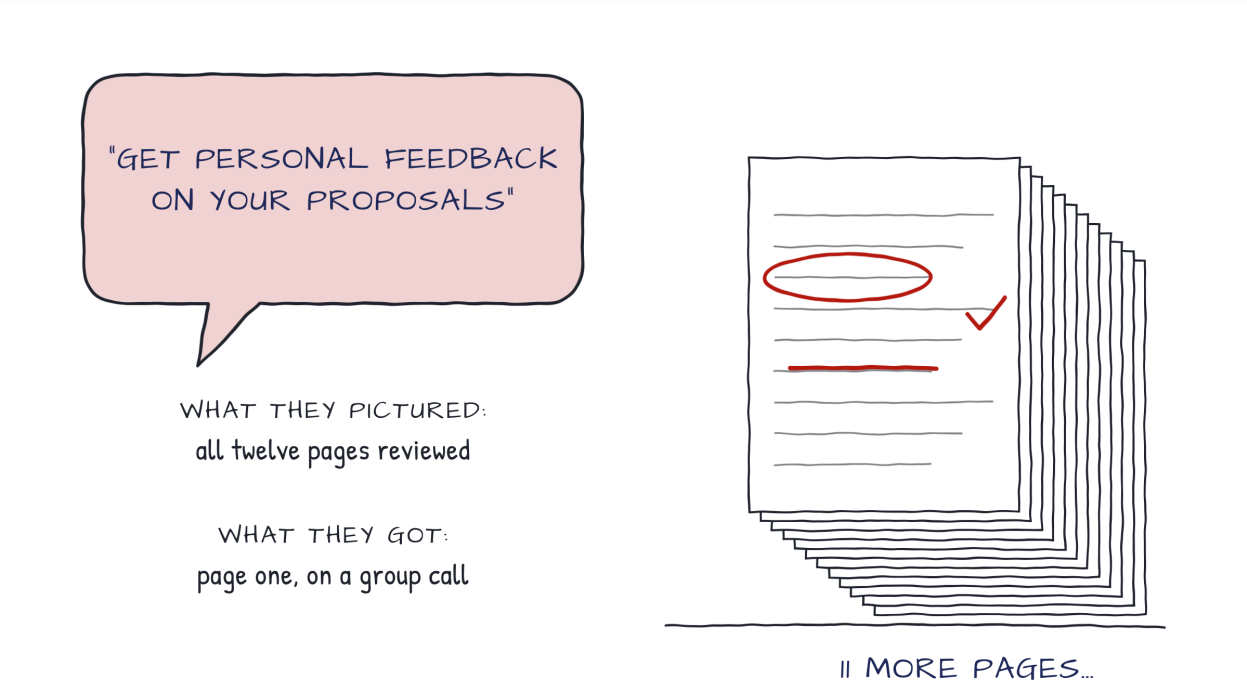
THE SALE THAT WROTE THE CANCELLATION

THE BIG IDEA

Many cancellations are written on the day someone buys. If what they picture when they pay isn't what they get, the clock starts ticking from day one.

IN THIS CHAPTER, YOU'LL LEARN

- How a perfectly honest sales page can still set up a disappointment
- The Promise Playback: three questions that show you what buyers really think they're getting
- How to decide which promise to keep, and how to say it clearly
- How to let people try the real thing before they buy



"Where do I upload the rest of it?"

Picture this. You're hosting Thursday's clinic at the Business Ignite Collective. A new member, Sophie, a freelance graphic designer, has just shared the first page of her proposal. You spend ten minutes helping her fix a scope problem that could have cost her two days of unpaid work. She's thrilled. You're thrilled. You're about to move on to the next person… and she asks where the other eleven pages go.

Eleven pages? There are eighteen people on this call. You've never offered to review a whole proposal!

But on Monday, sitting at her kitchen table with her credit card in hand, Sophie read this on your sales page:

Get personal feedback on your proposals before you send them to clients.

Read that again. Did you deliver it? Well… yes. She got personal feedback on her proposal before sending it. Did she get what she thought she was buying? Not even close.

The tricky part? Sophie is polite. She says, “Oh, got it, thanks so much!” and you move on. Three weeks later, she cancels. And someone in your team tries to work out what went wrong in week three.

The answer? It went wrong on Monday, at her kitchen table.

YOUR SALES PAGE IS MAKING PROMISES

This is where the first phase of RetentionCode, **Attention**, comes in. It answers the member’s first question: *Is this what I bought?*

And it starts before they even join. Every buyer is collecting clues about what being a member will be like. Your sales page is a clue. So is the question you answer in a free workshop, the testimonial next to the buy button and the late-night email someone on your team sends. The buyer can’t tell which of those are normal and which only happened because you had a quiet week. You can.

Here’s a quick test. Ask whoever writes your sales copy to finish this sentence: “Once someone joins, here’s how they get help with a piece of work.” Then ask whoever delivers the membership to finish the same sentence. If you do both jobs, write it once with your sales page open and once with your calendar open. (Calendars have a funny way of editing ambitious sentences!)

If the two answers are different, you’ve found a gap.

THE PROMISE PLAYBACK

To find out what buyers really picture, I use a tool called the **Promise Playback**. Pick one promise that people buy on, the line that makes them say, “Oh, that’s what I need”, and run it through three questions.

1 **What did we say?**

Copy the exact words the buyer saw when they paid. Not the improved version someone wrote last week. The real one.

2 **What did they picture?**

Ask the buyer to describe the first time they expected to use it. Get them to a real day with a real task. “I thought I’d get support” is a start. “I thought I’d upload my draft on Wednesday night and get notes back before my Friday meeting” is something you can actually check.

3 **What happened when they tried?**

Walk the route a member would take. Where do they go? What do they bring? Who replies, and by when?

Sophie’s Promise Playback

QUESTION	SOPHIE’S ANSWER
What we said	“Get personal feedback on your proposals before you send them to clients.”
What she pictured	A coach would read all twelve pages and send comments before Friday.
What happened	The coach talked through one scope decision on a live call. She still had eleven pages and a Friday deadline.

See the gap? Sophie doesn't care whether you call Thursday a clinic, a workshop or a working session. She cares deeply about whether her whole proposal gets reviewed before Friday. That's the detail worth putting on your sales page.

HOW TO RUN IT

Pick three people who joined recently enough to remember why. If you can, include someone who paid and never showed up. They often know something the regulars don't.

Send each of them a short, private email like this:

> EMAIL TEMPLATE
>
> Hi Sophie, I'm looking at how we describe the membership to new people. 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? A couple of lines is plenty. Thanks, Clint

Notice what's *not* in that email:

- No link to the sales page
- No explanation of how Thursdays work
- No hint about the "right" answer

You want to hear what they remember buying, not what you wish they'd bought.

Ask each person separately. If you ask in a group, everyone just agrees with whoever answers first. And when you get a reply, ask one follow-up: "Do you remember what gave you that impression?" You might be surprised. One member might say, "My friend's in your premium group, and she gets her drafts reviewed. I thought I would too." Now you've learned something no sales page edit would fix!

And if all three describe your offer perfectly? Brilliant. Leave the page alone and look elsewhere. There's no prize for rewriting something that works.

DECIDE WHAT YOU'LL ACTUALLY DELIVER

Once you've found a gap, you have a decision to make. And it's a business decision, not a copywriting one. First decide what you'll deliver. Then find the words.

Say you'd love to give every member a full proposal review. Great! But do the math first. Thirty members, twenty minutes each, is ten hours of coaching time. Every week. If that works at your price, go for it. If it doesn't, that's okay. A smaller promise you can keep is far better than a big one you can't.

If you decide to keep the live clinic, say exactly what it is:

> EXAMPLE WORDING
>
> Bring one pricing decision to our Thursday group clinic. Each week, the coach works through three member examples live. You can submit yours or follow along with the group.

Then make the welcome email match:

> EXAMPLE WORDING
>
> Thursday's clinic starts at noon Eastern. To have your pricing decision considered for one of the three live examples, send us the fee, the relevant scope paragraph and your question through this form by Tuesday at 5 p.m. We'll email the selected members on Wednesday. Everyone is welcome to attend.

Read those as Sophie. Now she knows where to go, what to bring and whether she'll definitely be picked. No nasty surprises.

Don't Forget the Fourth Person

Here's a question I always ask. What happens to the *fourth* person who submits a question? The first three people make your clinic look amazing. The fourth tells you if it really works. Could they still do something useful with you that week? For example, could they use the coach's pricing checklist on their own fee during the session? If the honest answer is "I hope they get picked eventually", that's a delivery problem, and no amount of clever copy will fix it.

What About Sophie?

Fixing the sales page helps the next buyer. It doesn't help Sophie, who's still holding eleven pages. So write to her personally: "I can see how our description led you to expect a full review. Here's what I can offer before your meeting." Then offer something real, like a look at the section with the most money riding on it.

A MISTAKE I MADE

I've fallen into this trap myself.

In one of my membership businesses, I ran the launches. People spent time with me, heard me teach and decided they trusted me. Then they joined… and someone else ran their onboarding.

From my side, that made perfect sense. But look at it from the buyer's side. They'd just decided to trust *me*, and the moment they paid, I disappeared. I never said "Clint will be there", but I didn't have to. They pictured it anyway.

So we changed who ran the launch content. Now the people buyers met before paying were the same people who looked after them afterwards. It would have

been easier to ask the team to make onboarding “warmer”. But the expectation started with the launch, so that’s where the fix had to start too.

You don’t have to personally teach every session forever. But your sale needs to introduce the business people will get.

LET THEM TRY AN ORDINARY THURSDAY

One of the best ways to help people buy with their eyes open is to let them try a small, real piece of the membership.

But be careful. Say you run a free pricing workshop and twelve people turn up. You’ve got time, so you review every single proposal. Everyone loves it! You finish with, “If today helped, you’ll love being a member.” Oops. You’ve just given them a demo of a service they can’t buy.

Instead, run the workshop the way members actually experience it. Ask people to bring one sentence from a real scope of work. Pick three examples to talk through, then give everyone five minutes to fix their own. At the end, ask someone whose example *wasn’t* picked what they changed. If they found it useful, you’ve shown the room what an ordinary Thursday feels like.

And if someone says, “That was great, but I’d still want someone to read the whole thing”? Perfect. Ask how often they need a full review before you send the enrollment link. Better they find out now than three weeks in.

CHECK THE PROMISES AROUND THE PROMISE

Your buyer experiences your sale as one conversation, even if four different people wrote parts of it. Check these three:

The introduction. If a partner told their audience you offer “weekly one-to-one coaching”, your accurate sales page won’t undo that. Give partners a short, accurate description they can use.

The testimonial next to the price. If a member raves about your personal help, but she was one of six founding members, say so. Or choose a story that matches what you’re selling today.

The payment line. “$150 per month” might mean a monthly membership or a twelve-month contract. If it’s the second, say “a twelve-month program at $1,800, paid in twelve monthly installments of $150” before they pay.

WHEN THE PROMISE IS MADE ON A CALL

If you sell a high-ticket program, your sales page probably isn’t where the real promise gets made. It’s made on a sales call, often by someone who isn’t you. And a lot of early cancellations start right there.

Marcus’s program sells on calls. He has two salespeople, both great people and good at their jobs. When his team listened back to calls with members who’d left in their first two months, one phrase kept coming up: “You’ll have your own coach.” And members did have a coach. One coach for every 75 members, on a group call every second week.

Nobody had lied. But when you hear “your own coach”, you picture someone who knows your name. The program wasn’t built for that. So members joined expecting a person, and got a calendar of group calls.

Play back the call, not just the page. Listen to three recorded sales calls with members who left early. Write down what was promised, in the buyer’s words, then run it through the Promise Playback. Listen for phrases like “your own coach” that your delivery team has never heard!

Check what you reward. If your sales team is paid only on closed sales, you’re paying them to get a yes, not the right yes. Consider paying part of the commission after the member’s first 60 or 90 days, or simply showing each salesperson how many of their members leave early. Not to catch anyone out. Most salespeople want their buyers to do well. They just rarely find out what happened next.

Decide who you won’t sell to. Write a short list of situations where your program won’t help yet. For example, they don’t have clients yet, they don’t have the hours the work needs, or they really want it done for them. Then give your sales team permission, and the words, to say so:

> EXAMPLE WORDING
>
> “From what you’ve told me, I think you’d get more from [the other option] right now. I’d much rather tell you that today than have you join and feel stuck a month from now.”

Yes, that might cost you a sale. But it’ll probably save you a refund request, a frustrated coach, and someone telling their friends your program didn’t work for them.

Hand over the notes. The buyer told your salesperson their goal, their deadline and what they were worried about. Make sure their coach sees that before the first

session, so the member never has to explain themselves twice. It's also the very first line in their member record.

AT SCALE

with Marcus · Systems That Scale

Marcus now runs the Promise Playback every quarter, with five to ten recent buyers from each way people join: sales calls, the sales page and partner referrals. His head of delivery sits in the monthly sales meeting, so any change to the offer is heard by both teams on the same day. And every buyer answers one question in the onboarding form before their first session: "What's the first thing you're hoping we'll help you with, and by when?" Their coach reads it before they meet.

YOUR ACTION STEPS

1. **Pick your promise**
   Choose the one line on your sales page that people buy on.
2. **Make a prediction**
   Before asking anyone, write down what you think buyers picture. (It's very humbling to compare later!)
3. **Ask three buyers**
   Send the email above to three recent members, separately.
4. **Walk the route**
   Log in as a member and try to use the promise yourself. Can you get it done by the deadline a member would have?
5. **Fix the gap in both places**
   If you change what you promise, change the sales page *and* the welcome email at the same time.

6 **Check in with your next new member**

Before they try it, ask what they expect. After they try it, ask what happened.

QUICK RECAP

- ✓ A lot of cancellations are written on the day someone buys.
- ✓ The Promise Playback asks: What did we say? What did they picture? What happened when they tried?
- ✓ Decide what you'll deliver first. Then write the words.
- ✓ Always ask what happens to the fourth person.
- ✓ Let buyers try an ordinary week, not your best-ever demo.

When your sale and your delivery match, Sophie joins knowing exactly what to expect. So her first question changes from "Where do the other eleven pages go?" to "I know which fee I'm worried about. Where do I start?" And that's exactly where the next chapter begins.

CONNECTION · DO I BELONG HERE?

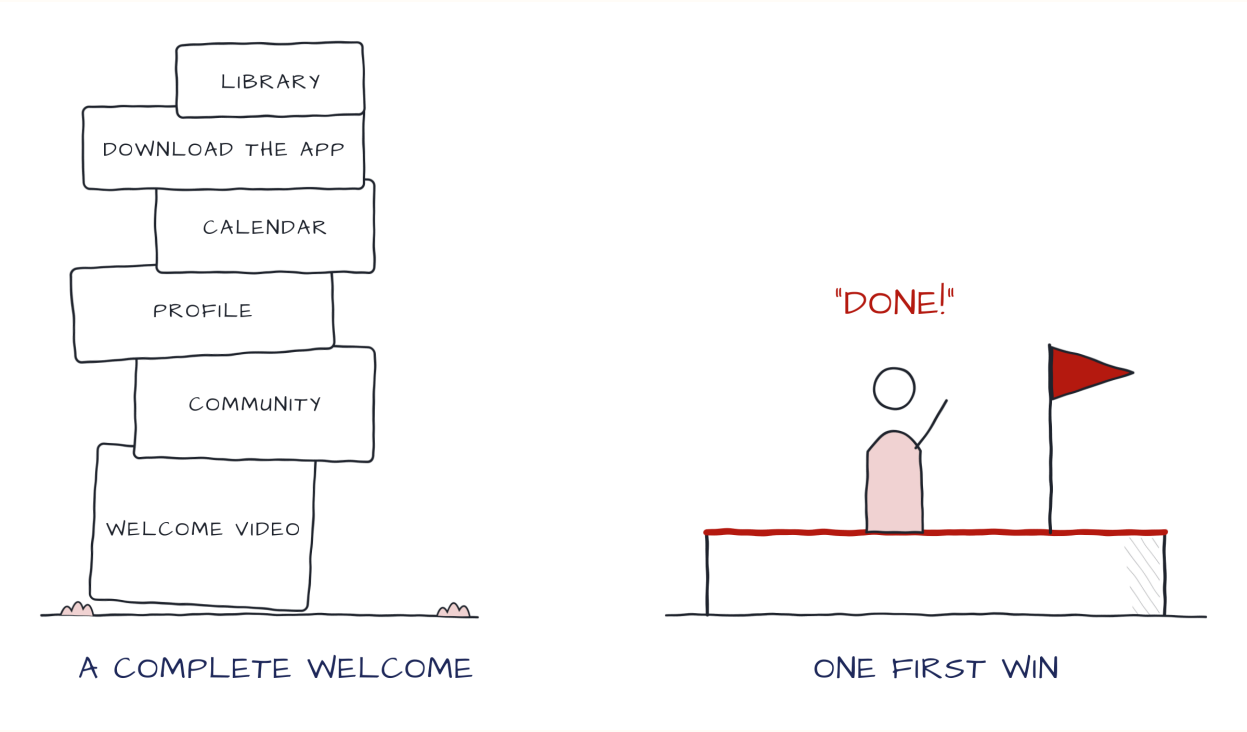
YOU HAD ME AT MY FIRST WIN

THE BIG IDEA

A new member doesn't need a tour of everything you offer. They need one useful thing done, fast, so they know joining was the right call.

IN THIS CHAPTER, YOU'LL LEARN

- Why a "complete" welcome can stop new members in their tracks
- What makes a good first win (and what doesn't)
- The First Win Plan: five decisions that design a member's first week
- How to follow up on Friday, whether they got there or not



A COMPLETE WELCOME

ONE FIRST WIN

“I’ve got the scope paragraph. I know which fee I’m worried about. Where do I start?”

Sophie has joined. She has a real proposal in front of her and a reason to get going. Then your welcome email arrives.

There’s a video from you. A link to the community. An invitation to introduce herself. A calendar to subscribe to. A profile to complete. A suggestion to download the app. And, right at the bottom, a link to your library of resources, three years in the making.

So Sophie starts at the top. She watches your video. She picks a profile photo. She writes an introduction and wonders whether admitting she’s nervous about pricing makes her sound like a beginner. By the time she reaches the resources, the fifteen minutes she had before her next client call are gone.

And the fee she was worried about? Exactly where she left it.

The next day, your platform shows Sophie has completed her profile, watched the welcome video and posted in the community. Three ticks! A wonderful start... according to the checklist.

But how would *Sophie* describe her first day?

WHAT I LEARNED IN A DANCE STUDIO

I first learned this lesson in my dance studio. We were brilliant at telling new families everything before their child took a single class. Class times, fees, uniforms, parking, what to bring. I thought being thorough would make people feel comfortable.

Then one day I watched a new student standing at the edge of a class while the other kids found their spots.

She had the right shoes. Her mom had done all the paperwork. But neither of those things told her where to stand. The other kids knew the warm-up. They knew each other. She was trying to follow the steps *and* work out whether she belonged in the room.

I'd spent so much time on what a *family* needed to know that I'd forgotten what a *child* needed to experience.

So we changed the first class. The teacher expected the new student, introduced her to someone and made sure she learned one short sequence before she left. Then, at pickup, we could tell her mom about a real moment from class, instead of asking if she'd got the welcome pack.

The paperwork still mattered. But now, when someone at home asked, "How was dancing?", she could say, "Watch this!"

That's what a first win feels like.

GIVE THE FIRST WEEK A DESTINATION

I get it. You've built so much, and there are amazing things in your membership that new members don't even know to ask for. Of course you want to show them everything!

But think about it from their side. They've just made a big decision. They chose you, put in their card details and paid. Now, the moment they walk in, you're asking them to make twelve more decisions. Which call? Which course? Which level? Should they introduce themselves first?

You can make that first choice easy.

For Sophie, the welcome could link straight to the scope worksheet. The first instruction says: "Open the proposal you're working on. Copy the sentence that says how many rounds of changes the fee includes." She can do that in ten seconds. She doesn't need a perfect headshot first!

Then the worksheet asks what happens if the client keeps asking for more changes. She looks at her paragraph and realizes it doesn't say! In ten minutes, she's found a real problem and fixed it with one clear sentence: *"The fee includes two rounds of changes. Extra rounds are charged at my hourly rate."* Designers call this a **revision allowance**.

That's a first win.

What Makes a Good First Win?

Run every first win through three quick tests:

- **Would the member choose it?** A lovely profile photo isn't why Sophie joined.
- **Can they get there with the help you actually offer?** "Get the client to sign by Friday" depends on the client, not you.
- **Will something be different when it's done?** "Feel more confident" is too fuzzy. "Send the price without apologizing for it" is something she'll notice.

THE FIRST WIN PLAN

This is where the second phase of RetentionCode, **Connection**, begins. It answers the member's second question: *Do I belong here?* And the first answer isn't a welcome party. It's a useful way into the thing they paid for.

To design that, I use the **First Win Plan**. It's five decisions about one person's first useful result. Keep them on one page where whoever welcomes the member can see them.

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1 **Name the win**

What does this person want to do, in their words? "Feel better about pricing" is where the conversation starts. Ask what they're working on this week, and you might get to "Send this proposal knowing I've covered the revisions."

---

2 **Choose the action**

What can they do *right now* with the time and materials they already have? Put a real piece of their work in their hands. Watching a video about confidence might feel easier, but it won't make the pricing decision for her.

3 **Provide the help**

What resource or person will help them do it, and when? If the live clinic only covers three examples, everyone else needs a way forward too, like a worked example they can follow.

4 **Check the result**

How will you both know it worked? A finished video tells you she reached the end. Asking "What did you change?" tells you if it helped.

5 **Agree on the next move**

Once the first task is done, what's next? Decide while she still remembers why the first one mattered.

Sophie's First Win Plan

DECISION	SOPHIE'S FIRST WEEK
Name the win	A proposal with a clear revision allowance, ready to send on Friday.
Choose the action	Check the scope paragraph and write the missing revision allowance.
Provide the help	The scope worksheet and a completed example, plus Thursday's group clinic.
Check the result	Ask what she changed, whether she sent it and what's still unclear.
Agree on the next move	Use the same check on her next proposal and bring one tricky decision to the clinic.

WRITE THE WELCOME AROUND THE WORK

Once you know Sophie's priority, her welcome email almost writes itself:

EMAIL TEMPLATE

Hi Sophie, welcome! You mentioned wanting to send your proposal on Friday, so let's start there. Open your draft and this scope check. Allow about fifteen minutes. By the end, you'll know exactly what your fee includes and which wording you're unsure about. Thursday's group clinic uses this same sheet. If you'd like your question considered as a live example, send it in by Tuesday at 5 p.m. There's also a completed example you can work through any time. Reply here if you get stuck!

See how it points her straight at the work she wants to finish? Logins and account details can sit underneath. They still matter, of course. A member who can't log in has a very urgent first task!

Now look at the rest of your welcome emails. Does each one help her move forward, or does it restart the tour? If Wednesday's email lists six optional sessions for next month just as she's trying to finish her proposal, send it later.

And here's a must-do. **Join your own membership as a new member.** Open the emails on your phone. Click the links. If "Start with the scope check" takes you to a home page with eight tiles and no scope check in sight, you've set your members a little scavenger hunt. Fix it before your next person joins.

NOT EVERYONE STARTS IN THE SAME PLACE

Two other members join the same week as Sophie. **Daniel** is a dentist with fifteen years in practice. He's adding veneers and wants to work out how to package and price them. **Priya** is a hairdresser who's just started renting her first chair. She doesn't have a price list yet, because she's still working out what to charge.

Send them all the same worksheet and Priya hits a wall at "Open the proposal or price list you're working on." She doesn't have one! Now she's worrying about how to explain why she can't do the very first thing you asked. That's not a great feeling to give someone who's just paid to belong.

Daniel has the opposite problem. The basics would bore him silly.

You don't need three different programs. You need two extra sentences: "If you've got a live quote, proposal or price list, use that. If you're still working out what to charge, start with this pricing worksheet." And for experienced members, a quick question: "Want to bring a pricing decision you're facing right now instead?" For Daniel, that's his veneers.

WHEN EVERYONE JOINS AT ONCE

If you enroll in launches, you might welcome 150 people on the same Monday. That's Marcus's world twice a year. You can't write 150 personal welcome emails. The good news? You don't need to.

Run a kickoff, not a tour. Hold one live session in the first three days where everyone does the first action together. Fifteen minutes of explaining, thirty

minutes of doing. “Open your proposal and find the paragraph about revisions”, right there on the call.

Offer two or three starting tracks. Ask one question in your welcome form: “What are you working on right now?” Then send each answer to a different first action. Sophie gets the scope check. Priya gets the pricing worksheet. Daniel brings his veneers to the experienced owners’ track.

Set a first-win target, and count it. For example: “By day 7, every new member has finished one first action.” Then look at the number after every launch.

Spend your personal time on the ones who are stuck. On day 5, look at who hasn’t finished their first action, and have a real person reach out to those members only. That’s where your team’s time makes the biggest difference.

IT WORKS FOR MASTERMINDS TOO

Take **Ben**, who’s just joined the Agency Owner Mastermind, a $3,000-a-month group for established agency owners. He tells the facilitator he wants to take a full week off without the agency needing him. That’s a great goal, but it’s a twelve-month goal, not a first win.

So the facilitator helps him find a first step he can finish by Friday. Ben picks the weekly client report he still writes himself. His action is a one-page handover note for his account manager. His help is the group’s handover template, plus five minutes in Thursday’s hot seat to test it. And the check? Did the report go out on Monday without Ben touching it?

Ben doesn’t need a portal tour in his first week. He needs one thing off his plate, and proof that this group can help him do it.

WHEN FRIDAY COMES

Here's where your beautifully planned first week meets real life. Friday arrives. Either Sophie has sent her proposal, or she hasn't.

If she hasn't, don't ask, "How are you enjoying the membership?" That makes her sum up the whole experience when all she's thinking about is the unfinished task. Ask about the task: "Were you able to finish the revision paragraph? If you got stuck, which part stopped you?"

Her answer tells you exactly what to do next:

- **"I didn't know how many rounds the client expects."** Help her write a short question to the client.
- **"I couldn't find the worksheet on my phone."** Fix the link and send it straight to her.
- **"The client postponed."** Her priority may have changed. Ask what would make next week useful.
- **"I'm behind already."** Tell her exactly where to restart, and if the task was too big, make it smaller.

And if the problem was on your side, own it: "The worksheet link didn't work on mobile. We've fixed it, and here's the direct link. Does Friday still work?"

Now, what if she *did* send it? Celebrate! Then, before pointing her at the full calendar, ask where she'll use the scope check next. Maybe it's the proposal she's writing on Tuesday. Now she's got a reason to come back.

RUNNING IT ON YOUR OWN

If you're a solo owner, "personal follow-up" can sound like one more job you don't have time for. So do the math first. Six new members at ten minutes each is an hour a week. Sixty new members is ten hours. Plan for it before you promise it.

Here's how to make it manageable. Set up the worksheet, the example and the access instructions once, so they answer the common questions for everyone. Then save your personal attention for the members who need a different starting point or are still stuck. And keep one short note for each new member: their goal, their first action, the date and what they told you.

AT SCALE *with Marcus · Systems That Scale*

At Marcus's program, the onboarding lead owns one number: the share of new members who finish their first action within seven days. It's the first thing Marcus asks about after every launch. And a week before each launch, she joins as a brand-new member, on her phone, and walks the whole welcome route. It takes her an hour, and it has caught a broken link every single time.

YOUR ACTION STEPS

1 **Pick one member**

Choose a recent joiner whose reason for joining you know, or ask your next new member, “What would you love help finishing this week?”

2 **Fill in the First Win Plan**

Answer the five decisions for that one person, using a real task.

3 **Rewrite your first welcome email**

Lead with the first action, not the tour.

4 **Walk the route yourself**

Join as a member, on your phone, and time the first task.

5 **Follow up on Friday**

Ask about the task, not the membership.

6 **Try it with your next group**

Track who got their first win, who got stuck and who hasn’t replied. Then ask the ones who finished what helped.

QUICK RECAP

- ✓ A complete welcome can get in the way of the work a member joined to do.
- ✓ A good first win is something the member would choose, can reach with your help, and will notice when it's done.
- ✓ The First Win Plan: name the win, choose the action, provide the help, check the result, agree on the next move.
- ✓ Give different members different starting points with just a sentence or two.
- ✓ On Friday, ask about the task, not the membership.

Picture Sophie closing her laptop on Friday evening. The proposal's sent, and the price is one she feels good about. She came in worried about a real piece of work, and now it's done. But when the client replies, who inside the membership will she want to tell? That's where we're going next.

PIT STOP

“CLINT, THIS SOUNDS LIKE A LOT OF WORK”

Before we keep going, I want to talk about a feeling you might be having right now. Maybe you’ve got hundreds of members, and you’re thinking, “Clint, I can’t write a First Win Plan for every one of them!”

My answer? Yes, it’s work. Just like every other part of your business.

But think about this. If you were reading a book about bringing in new members, and every chapter gave you a fresh idea for your next campaign, you’d be excited to try them all. You’d find the time. You’d probably stay up late doing it!

Retention deserves that same energy. Every member you keep is one you don’t have to find again. Their results become your best marketing. And your team gets to spend their days helping people, not replacing them.

And you’re not doing it all at once. You’re fixing one thing, then the next. The At Scale boxes will show you how to share the load as you grow.

This work can change your business, your life and the lives of your members. There’s absolutely zero downside to doing it. So grab a coffee, and let’s keep going.

CONNECTION · DO I BELONG HERE?

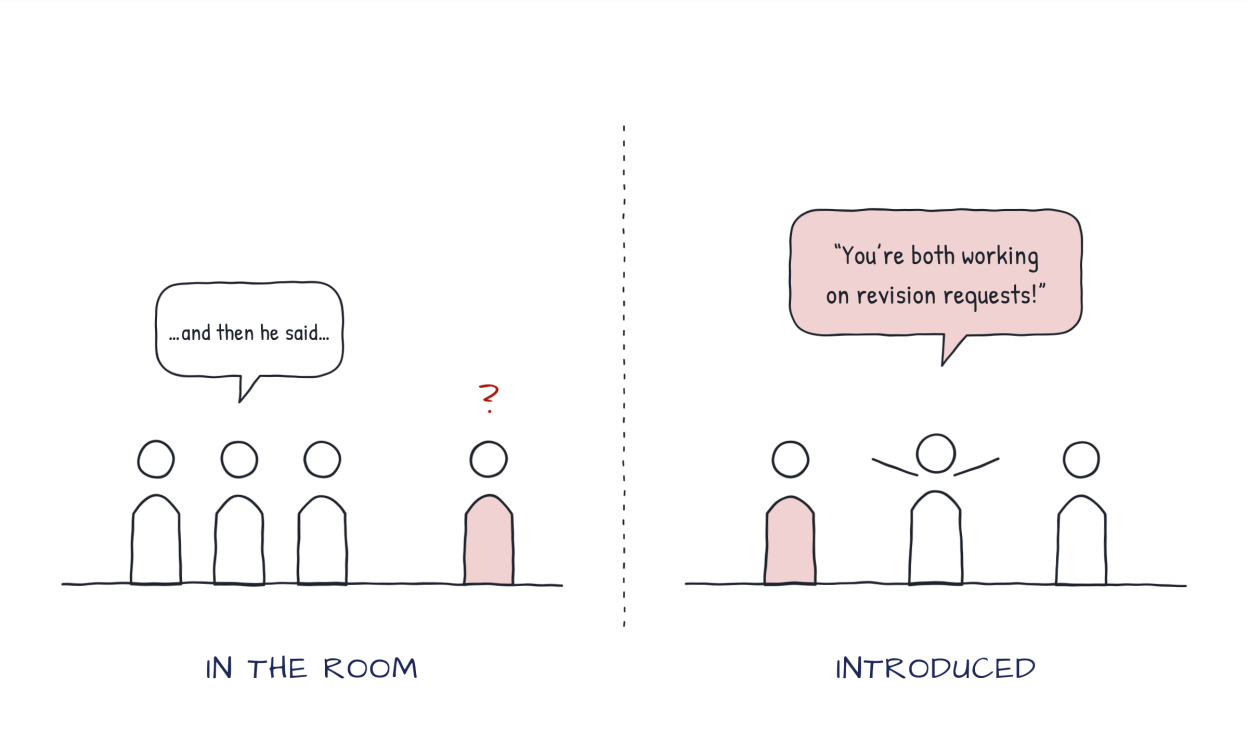
WHO KNOWS YOU'RE HERE?

THE BIG IDEA

Members stay longer when someone besides you knows what they're working on. A busy community isn't the same as a member who knows someone in it.

IN THIS CHAPTER, YOU'LL LEARN

- Why an active community can still leave new members on the outside
- The Second Name Test: one question that tells you if a member has found their people
- How to make introductions that actually lead somewhere
- How to stop the founder being the only person every member knows



The client says yes!

Sophie reads the email twice. The client has accepted her fee, *and* the sentence she worked so hard on in Chapter 4: two rounds of changes included, with extra rounds charged separately. For the first time, she won't be doing endless free changes. She opens the membership community to share the news... then stops, hands hovering over the keyboard.

What would she even write? Does everyone announce a new client? Some people in here are working on much bigger projects. One of them posted a photo from an awards dinner yesterday. So Sophie closes the tab and texts her sister instead.

Her sister sends back six exclamation marks. Excellent sistering! But she has no idea why one sentence about extra changes matters so much.

Meanwhile, back in the membership, three regulars are chatting under a question another member has posted and the founder has jumped in. If you looked at the

community that afternoon, you'd see a buzzing, friendly group. Sophie's silence would barely register.

She likes the program. It helped her. She's happy to pay for another month. What she doesn't have yet is *one person in the room* who knows what that Friday meant to her.

THE MEMBER WHO LEFT WHEN HER FRIEND DID

I learned this the hard way. A member canceled shortly after a friend she'd made in the membership left. At first, I treated them as two separate decisions.

So we asked her the usual questions. Was the content still relevant? Were the calls at the wrong time?

Her answer had nothing to do with either. She had nobody to message after a call anymore.

She and her friend had joined around the same time. They compared notes, checked in on what each had promised to do, and shared the things they weren't ready to post in front of everyone. When she finally handed a task over to her team, her friend knew she'd been putting it off for six weeks. She didn't have to explain why it mattered.

When her friend left, all the training and calls were still there. From our side, nothing had changed. From hers, everything had.

That changed how I thought about community. I stopped asking only "How many people are posting?" and started asking "Is everyone getting to know *someone*?" I couldn't create a friendship. But I could stop assuming that putting people in the same online group was enough.

Sophie hasn't lost anyone yet. She just hasn't found anyone. So let's help her.

THE SECOND NAME TEST

Ask a member this question, privately:

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

I call this the **Second Name Test**. The first name is usually yours, or the coach's. The *second* name tells you whether they've found someone they can go to without going through you.

Listen carefully to the answer:

- **"I always enjoy Leah's posts."** Leah has an audience. That's a start.
- **"I'd ask Leah. We talked about what's included in our prices last week."** Now that's a real connection.
- **"Nobody yet."** You've found somewhere to help.

One important thing. This isn't a test members have to pass. Some people are perfectly happy learning quietly and using the coaching they paid for. So always ask, "Would you like me to introduce you to someone?" If they say no, respect it.

Think About the Last Event You Went To

You know the host, but almost nobody else. You have a lovely chat with the host… and then someone else needs them. Now you're standing there holding your drink, wondering whether to interrupt a group mid-story. Awkward!

Now imagine the host says, "I want you to meet someone. You're both working on the same kind of project." You still have to have the conversation, but at least you know why you're standing next to each other. That's what a good introduction does.

HOW TO MAKE AN INTRODUCTION THAT WORKS

Let's stay with Sophie. She's just used the scope check on her first proposal. Another member, **Leah**, is a chiropractor who opened her own clinic last year. Her patients keep asking for "just a quick extra adjustment" between the sessions they've paid for, and she's getting ready to explain what her treatment packages include. Different businesses, same problem! Both have something to talk about, and both can help each other.

You *could* tag them in a post: "You two should connect!" Done. Time for lunch.

Except now Sophie has to work out what to say, Leah has to work out why she's been tagged, and both have to find time on a busy day. You've handed them a job they never asked for.

Instead, follow these four steps:

1 **Ask each person first**

Privately. "There's another member working on explaining what's included in her price this week. Would you like a short swap of ideas?"

2 **Make the introduction specific**

Explain why you're introducing them, using only details they're happy to share.

3 **Give the first exchange a job**

Something small and clear, like swapping one example.

4 **Check back with both**

A week later, ask each of them how it went.

Here's what the introduction might look like:

EMAIL TEMPLATE

Hi Sophie and Leah! You both said you'd like to meet someone working on explaining what's included in their price. Sophie has just rewritten the scope section of a design proposal, and Leah is preparing to explain her treatment packages to patients. If it suits you both, why not each share one short example of how you'd explain what's included, and what costs extra? Then ask each other one question about what's clear and what might be misunderstood. You can do it here in writing or jump on a quick 15-minute call. Would next week work?

Now they both know why they're connected and what to do. Nobody has been appointed anyone's coach, and nobody has signed up for a weekly meeting that follows them into retirement! They can try one swap and decide whether to keep going.

Make Sure Both People Get Something

Be careful not to quietly give your best members a second job. You know the type. The generous member who gets tagged in every beginner question. The one who knows the platform and gets introduced to every newcomer. Before long, they're doing your job without ever agreeing to.

So look for exchanges where *both* people bring something. Sophie may have less experience, but she can tell Leah which part of her explanation is confusing. That helps Leah too.

And if you need someone to regularly mentor or host? Make that a proper role, with a clear invitation, clear time and, where it fits, payment.

CHECK WHAT HAPPENED

A week later, ask each person privately: "Did you get a chance to connect? Was it useful? Would you feel comfortable reaching out again?"

That last question is the important one. Two people might do the swap politely and never want to talk again, and that's fine. Or they might have clicked and just need permission to keep going without you.

Sophie says, "Yes! Leah spotted a sentence I'd read three times and still missed." Love it. That's a second name with a real moment behind it.

If nothing happened, find out why. Was it the timing? Did they think they had to book a formal meeting? Sometimes a smaller ask fixes it: "Would you each rather leave a quick voice note?"

And always make it easy to say no. "If the timing or fit isn't right, just tell me and we'll sort something else out." People feel awkward turning down an introduction you were excited about.

MAKE THE ROOM SMALLER

Have a look at the last five introductions in your community and the replies they got. Lots of waving emojis? They feel friendly, but they don't give a new member anything to do.

When **Priya** posts that she's just started renting her first chair, one person replies, "Welcome! You'll love it here." Another asks, "What kind of clients would you love to fill your chair with?" Only the second gives Priya something to answer. Teach your hosts and regulars to do that: notice one detail and ask one question.

Often, the easiest room is a smaller one. When a pair works well, try a small group of three. Here's a simple 30-minute format:

- **3 minutes:** settle in
- **7 minutes each:** share one decision you're facing, hear questions and choose a next step
- **6 minutes:** everyone says what they'll do and by when

Someone keeps time. The structure stops the quiet person getting lost and gives the confident talker a way to help without taking over.

And three rules keep small groups healthy:

- Never make sharing private details the price of joining. A made-up example is fine.
- Decide upfront what happens when someone misses a session, so one absence doesn't become a guilt trip.
- After a few meetings, ask if it's still helping. It's okay for a group to change, or to finish.

It Works for Professional Networks Too

Tom joined a paid network for independent bookkeepers, mostly for the referrals. The monthly online meetup had 80 people on it. Tom listened, learned plenty and never said a word. After six months, he couldn't name a single member, and he hadn't had one referral.

Then the network changed one thing. Every meetup now opens with ten minutes in breakout rooms of four, grouped by the kind of clients they serve. In his first room, Tom met two bookkeepers who work with tradespeople, just like him. A month later, one of them sent him a client she didn't have room for.

Same Tom. The room just got small enough for someone to notice him.

DON'T BE THE ONLY NAME THEY KNOW

If your name is on the door, this part matters. A member who only knows *you* has a very specific version of your membership. Every question goes through you. Every win waits for your reply. If you're away for a week, it's like the membership has disappeared.

So introduce members to the people who can help them, and tell them why: "Grace hosts our monthly working session. If you'd like help finding someone to swap drafts with, ask her." That's far more useful than "Meet our amazing team!" above twelve headshots.

And when two members start working through a good question together, hold back for a moment before you jump in. You don't have to be the first answer to everything.

Here's why this matters so much. A membership built entirely around the founder can only grow as far as the founder's week stretches. Every member who knows a second name is a member who doesn't need *you personally* to stay. And honestly, that's freedom. It's what lets you take a vacation, sell the business one day, or just stop answering questions at eleven at night!

AT SCALE

with Marcus · Systems That Scale

Marcus can't hand-make 150 introductions, so his program builds them in. New members go into pods of five who started together and work with similar clients. Each pod gets a shared first task and a host for its first three meetings. The 30-day check-in form asks the Second Name Test, and the community manager personally follows up with everyone who answers "nobody yet". It's usually a short list, and it's exactly the right people to call.

YOUR ACTION STEPS

1. **Ask the Second Name Test**
   Pick one newer member who wanted to meet people. Ask them privately.

2. **Find a match**
   Look for someone working on something similar who can realistically make time.

3. **Ask both people separately**
   Be specific about how small the ask is. "Swap one paragraph by Wednesday" is very different from "weekly accountability calls".

4. **Write the introduction**
   Explain why, give the first exchange a job and offer an easy way out.

5. **Check back in a week**
   Ask both people: Did it happen? Was it useful? Would you reach out again?

6. **Build one habit**
   Maybe your welcome email asks, "Would you like to meet someone working on something similar?" Keep it small enough that you'll follow through.

QUICK RECAP

- A busy community isn't the same as a member who knows someone in it.
- The Second Name Test: "Besides me, who here would you feel comfortable asking for help?"
- Good introductions follow four steps: ask, introduce, give it a job, check back.
- Make sure both people get something, and don't turn generous members into unpaid staff.
- The fewer members who only know you, the stronger your membership is.

A week later, Sophie's client asks for a second version of the design. This time she messages Leah: "Remember that revision wording? I'm about to use it!" A conversation has started that you didn't have to host. That's connection.

Now, you're probably already thinking about what to add for your members next month. Another call? A guest expert? Before you add anything, let's look at what all that activity is asking your members to do.

EXECUTION · IS IT WORKING?

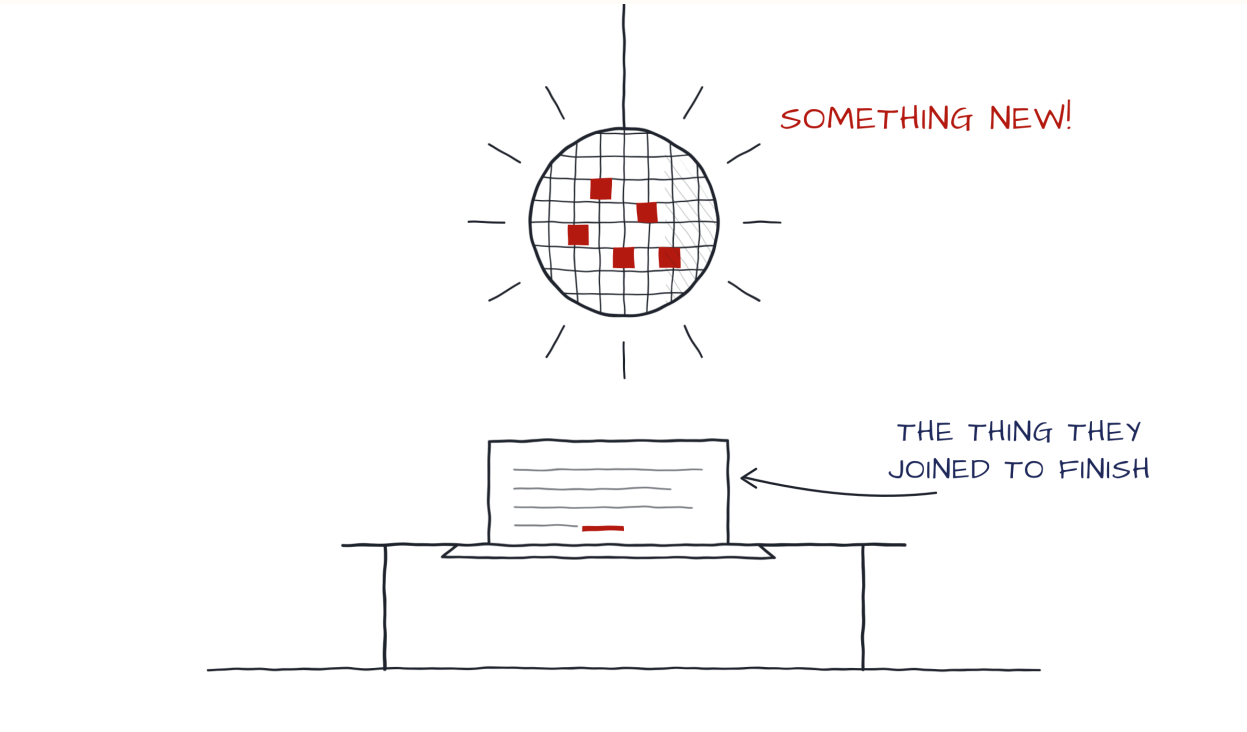
THE SHINY DISCO BALL PROBLEM

THE BIG IDEA

A packed calendar can make members feel further behind, not better looked after. You're counting what goes in. They're feeling what hasn't come out.

IN THIS CHAPTER, YOU'LL LEARN

- Why "overdelivering" can push members out the door
- How to see your calendar as a claim on your members' time
- Teach, Apply, Finish: a simple rhythm that turns learning into finished work
- How to cut back without breaking your promises



It's the first of the month, and you're pretty pleased with yourself.

The member calendar looks fantastic. A guest expert. A new masterclass. Weekly coaching. A networking session. And a bonus workshop that wasn't even in the original offer! Eleven chances to get value from the membership.

You send the announcement. Someone replies with three fire emojis. Another says, "You always overdeliver!" You forward that one to the team.

Meanwhile, one of your members opens the same email and starts negotiating with her calendar. She could move a client call. Watch the expert over lunch. Catch the workshop recording on Sunday. She adds three events and saves the email for later.

And the project she joined to finish? Still sitting open on her computer.

By the end of the month, she's been to four sessions and downloaded two worksheets. She likes you. She tells people the content is excellent. Then the payment comes out, and she wonders if she can justify another month.

You look at everything you delivered and think, "What more could she possibly want?"

She looks at everything she *hasn't* done and thinks, "I'm wasting this."

You're counting what went in.
She's feeling what hasn't come out.

WHAT IS THE SHINY DISCO BALL PROBLEM?

Something new arrives, catches the light and pulls everyone's attention towards it. For a moment, the room feels alive! The trouble is what happens to the work people were doing before they looked up.

Now, I'm not against the disco ball. A great guest expert can be brilliant. But novelty is *so* easy to announce. "Next month, we're helping you finish what we started this month" just doesn't sound as exciting as revealing a famous guest.

But finishing the thing is what members actually paid for.

MY VERY FULL CALENDAR

There was a time when I would have proudly shown you our member calendar as proof of how well we looked after people.

We had our regular coaching calls. Then I added a guest expert. Then an extra workshop. Then another session because a great topic came up in the community. Every addition had a good reason, and honestly? I loved putting it all together.

Then, on a coaching call, a member asked about something we'd covered weeks earlier. She'd been to the training. She had the worksheet. She just hadn't used it yet, because before she'd found time to start, we'd given her something new to think about.

So I asked the group what they'd actually put into practice from the month before. The call went very quiet. Much quieter than the chat had been during the sessions!

That was uncomfortable. I'd been treating a full calendar as proof of value without checking how much of it people could use.

So we left more room between learning one thing and being asked to learn the next. Some sessions simply became, "Bring the thing you haven't finished." It felt so underwhelming to write. But it was exactly what some members had been waiting for.

TRY THIS

Before you add any session, finish this sentence: "This will help a member do _____." If the honest answer is "They'll love the speaker", that tells you why they might come. But what happens afterwards?

YOUR CALENDAR IS A CLAIM ON THEIR TIME

Pick a member you know well and look at next month's calendar through their eyes. How much time would they need to attend, prepare *and* use what you teach?

Count all three. A 60-minute workshop that creates three hours of work is really asking for four.

Now compare that with the time they expected to give you when they joined. If your sales page suggested two hours a week and your program needs six, that's not a commitment problem. That's a design problem.

"But they don't have to come to everything!" Great. Have you told them that? Can they see at a glance which sessions matter for their goal and which they can skip? Eleven optional events still feel like eleven things to fall behind on when you promote every single one as unmissable.

GIVE THE MONTH SOMEWHERE TO GO

Back to Sophie. She's sent a proposal, won a client and met Leah. Now she needs a way to keep moving, without starting fresh every week.

I like to set three levels:

- **The destination gives direction.** Where does she want to be in a few months? For Sophie: a proposal process she can repeat, so she stops reinventing every proposal.
- **This month's focus keeps her on track.** Build the proposal template and use it on her next suitable inquiry.
- **This week's next step fits real life.** One task that fits the time she has this week.

TEACH, APPLY, FINISH

This is the third phase of RetentionCode, **Execution**. It answers the question members ask most often: *Is it working?*

To help members get results, I use a simple three-step rhythm: **Teach, Apply, Finish.**

1 **Teach**

Keep the lesson to what this task needs. For Sophie, that's a short lesson on writing clear deliverables and explaining revisions, with a good example. Not a grand tour of everything you know about proposals!

2 **Apply**

Help members turn the lesson into a decision about their own work. "Improve proposals" is a topic. "Draft the scope section for the café project on Wednesday morning" is a plan. One paragraph is enough. If your planning worksheet takes longer than the task, have a word with your worksheet!

3 **Finish**

Make room for the actual work, with help nearby. This is the part that always disappears when a session runs long. The host says, "Now go and implement!" and everyone leaves with great intentions… and nowhere to do the work.

What a Finish Session Looks Like

Here's a simple 50-minute working session:

- **5 minutes:** everyone chooses their task
- **20 minutes:** work on it
- **10 minutes:** questions
- **10 minutes:** fix and improve
- **5 minutes:** decide what happens next

Tell people exactly what to bring: "Bring your proposal draft and one question about the scope." And for members who can't come live, give them the same task, the same example and a clear way to ask for help.

Afterwards, ask what happened when they tried. Their answer tells you what to teach next.

WHEN THE PROMISE IS ENJOYMENT

Not every membership is about getting work done. Picture a photography club for people who just want to enjoy taking better photos.

One member has watched the lighting lessons, bought the recommended lens and saved three editing tutorials. But her camera stays in the cupboard most weekends. At renewal time, she thinks, "I hardly use it." She means the membership *and* the camera.

Her next useful experience might be a Saturday photo walk. A quick lesson on window light first (Teach). She picks one subject and a spot to practice (Apply). On

the walk, she takes photos and asks for help (Finish). Afterwards, the host asks, “Did you get to try it? How did it feel?”

In a hobby membership, enjoyment *is* the result.

IT HAPPENS IN MASTERMINDS TOO

Ben’s agency mastermind started with a weekly hot seat and a monthly guest. Then came a book club, a quarterly retreat, a private podcast and a “wins” channel. Every one was a good idea. Together, they meant members spent more time *attending* the mastermind than *acting* on it.

The facilitator noticed Ben brought the same delegation problem to three hot seats in a row. He wasn’t short of advice. He was short of the hour it would take to use it.

So the next month had fewer events and one new rule: everyone leaves a hot seat with one commitment, and the next call starts by asking what happened. Fewer sessions, more done.

WHAT COMES OFF THE CALENDAR?

Let’s go back to that eleven-event month and look at it through Sophie’s eyes. Two of the live lessons cover what’s already in the library as a recording, the bonus workshop has nothing to do with proposals, and there’s no time anywhere to work on a draft.

A Month Built Around One Priority

BEFORE: 11 LIVE EVENTS	AFTER: 8 LIVE EVENTS
4 live teaching sessions	2 relevant live lessons, plus links to existing recordings
4 general coaching calls	2 general coaching calls + 2 proposal working sessions
1 guest interview	1 guest interview, briefed on what members are working on
1 unrelated bonus workshop	Moved out of this month
1 networking event	1 networking event, clearly described for those who want it

Eight events isn't the goal. The goal is that members can finish real work with your help. Sometimes that means adding support where it's missing, not just cutting.

A few quick tips:

- **When members request a topic, ask why.** "What are you hoping to do with it over the next month?" Someone asking for a new marketing platform workshop might really need help following up the leads they already have.
- **Agree to a rule with your coaches.** Coaches love adding sessions, because they care. So agree that every new session has to finish the sentence "This will help a member do _____", and something else comes off the calendar to make room.
- **Brief your guests.** Tell them what members are working on and what they're stuck on. A brilliant speaker can still deliver the wrong session if all you've said is "Our audience would love to hear from you."

EXPLAIN THE CHANGE BEFORE THEY ASK

Here's how *not* to do this: quietly remove sessions, send a cheerful email about "simplifying the experience" and hope nobody notices. They will!

If you sold a specific number of sessions, keep that promise for the people who bought it, or agree the change with them. Then explain what's changing and why:

EXAMPLE WORDING

We've heard from members who understand the proposal lessons but are struggling to finish their own drafts. So next month, two of our coaching calls will become proposal working sessions, with time to write and get help with whatever's holding you up. The existing lessons are still available, and we'll point you to the right sections beforehand. If you use those calls for something else, reply and let's chat about how this affects you.

Then deliver it. A working session where nobody can get a useful answer is just homework with a Zoom link!

WHEN THE MONTH DOESN'T GO TO PLAN

People get sick. Clients move deadlines. Some tasks are harder than they look. When work stalls, start with the work: "What happened when you tried to draft that section?" is far better than "Why aren't you implementing?"

Their answer tells you which step needs attention:

- **They can't explain the idea?** Teach it again with a different example. (Teach)
- **They understand it but can't apply it?** Work through the decision with them. (Apply)
- **They have a plan but no time?** Make the task smaller. (Finish)

AT SCALE

with Marcus · Systems That Scale

Marcus's calendar had grown to 23 live sessions a month. Nobody planned it that way. Eight coaches, a guest program and the marketing team could all add to it, and they all had good reasons! Now his head of delivery has the final say, with a time budget: no more than three hours a week of live sessions for a member on the core track. Anything new fits inside it or replaces something. And each month, a sample of members gets one question: "How many hours did the program ask of you, and how many did you actually have?"

YOUR ACTION STEPS

1 **Count the real time**

Take next month's calendar and one member you know well. Add up attending, preparing and doing. Compare it with what you promised.

2 **Choose one focus**

Pick one focus for the month that suits a group of members.

3 **Plan the month as Teach, Apply, Finish**

Use lessons you already have. Add at least one working session.

4 **Change one session**

Turn one general call into a working session, or move one "nice to have" event out of the month.

5 **Tell members before they have to ask**

Use the email above as a starting point.

6 **Count three groups at the end of the month**

Who finished, who's still working on it, and who you haven't heard from. Then ask each group what helped and what got in the way.

QUICK RECAP

- ✓ A packed calendar can make members feel like they're failing, even when they love you.
- ✓ Every session is a claim on your members' time: attending, preparing *and* doing.
- ✓ Give every member a destination, a focus for this month and a next step for this week.
- ✓ Teach, Apply, Finish: teach what's needed, apply it to real work, then make room to finish it.
- ✓ Explain any change before members have to ask.

At the end of her redesigned month, Sophie has used her template on a real inquiry. When the next payment comes out, she can link the membership to a real change in her business. That's execution.

But all of this assumes members can get into the room. What about the member who blocked out the hour, prepared her question, clicked the link… and found nobody there?

EXECUTION · IS IT WORKING?

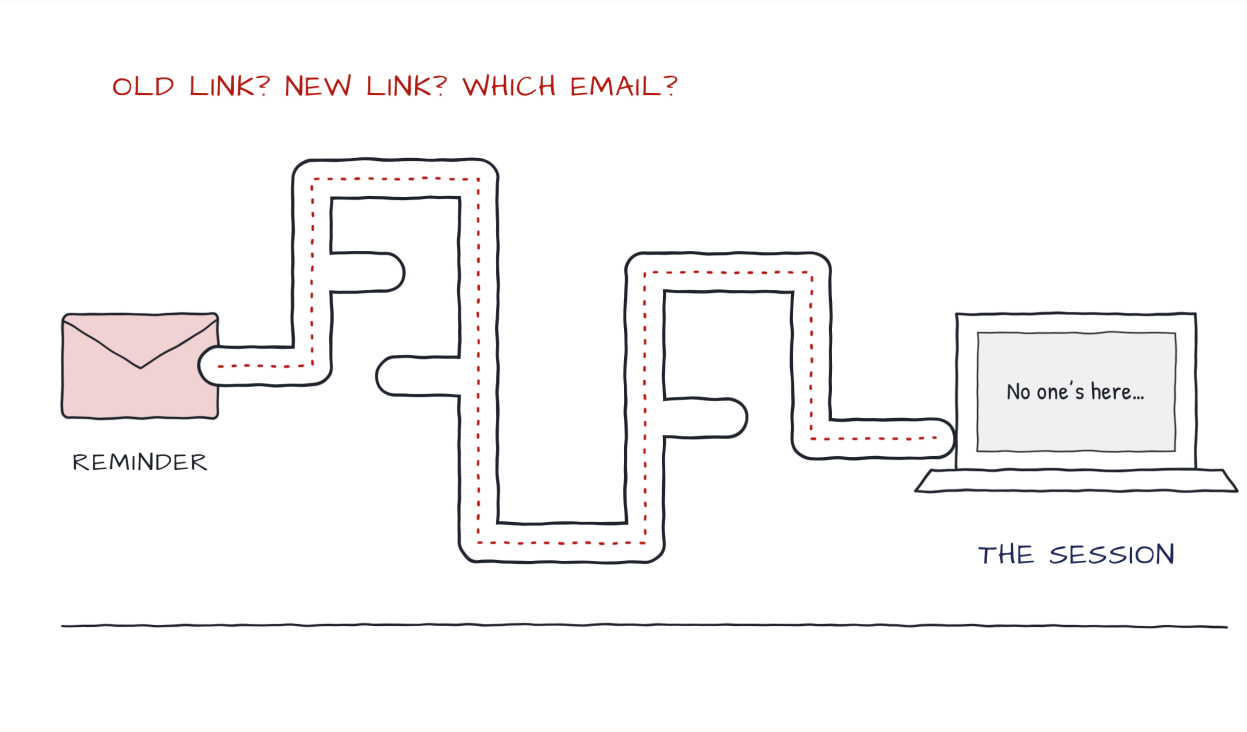
THE WRONG ZOOM LINK

THE BIG IDEA

Every time something goes wrong in your delivery, somebody does extra work to fix it. If that somebody is usually the member, you're slowly wearing them out.

IN THIS CHAPTER, YOU'LL LEARN

- Why "small" delivery mistakes add up to big cancellations
- The Touchpoint Tally: a quick way to check if members can actually use what you sell
- Own it, Repair it, Prevent it, Prove it: four steps for when things go wrong
- The one route almost nobody checks (and it's costing you members)



He made time for this.

Daniel, the dentist who joined with Sophie, has moved two patients, shut his office door and opened the email for the Thursday clinic. He's been meaning to come for weeks. He's got his question about pricing veneers ready. For once, he's early!

He clicks the link. Nobody's there.

At five past, he checks the time zone. At seven past, he searches his inbox and finds another reminder, with a *different* link. That one takes him to another empty room.

He messages support. Then he spots a post in the community: "This discussion is exactly what I needed!"

The session is happening. He's just not in it.

Later, someone from your team explains the link changed. The new one was in the community post. They suggest he watch the recording.

From inside the business, it sounds like no big deal. One out-of-date link, and the recording is right there. From Daniel's side? He rearranged his day, followed your instructions and missed his chance to ask his question.

Your calendar says *delivered*. Daniel would say otherwise.

THE WORK AROUND THE WORK

You can have brilliant teaching, generous people and amazing resources, and *still* have a membership that's exhausting to use.

Think about everything a member has to do that isn't on your sales page. Find the right page. Work out which instruction is the latest. Remember where questions go. Chase an answer. Every one of those jobs uses up the time and energy they brought to do the actual work.

Take the phrase "It's all in the portal." To you, it means everything's organized and available. To a member, it can mean another search through folders named after programs they've never heard of.

A member's willingness to make an effort is precious. Spend it on what they joined for, not on avoidable confusion.

THE EVENING I WASTED FOR A MEMBER

I've been on the wrong side of this. A member asked where to submit her work, so we sent her the link to the instructions. She'd already been there. The instructions linked to an old form we didn't use anymore. We'd announced the new process in the community, but nobody updated the original page.

From our side, it was a small admin mistake. We sent her the right form and ticked it off.

But when she canceled, we heard what had happened *before* she asked us. She'd set aside an evening to finish her submission. When the form didn't work, she assumed it was her fault. She went back through the welcome email, searched the resource folders and tried again. Our reply arrived the next day and sent her back to the page where she'd started. By the time we sorted it out, she'd missed that week's feedback deadline.

I was proud of how fast we fixed the link once we knew. She was thinking about the evening she'd lost trying to use something she'd paid for.

She'd arrived ready to do the work. We'd used up all her effort just getting her to the starting line.

SMALL TO WHOM?

One wrong link doesn't cause a cancellation. But it all adds up.

The link was wrong last week. The replay took longer than promised. The support answer was a link to the page they'd already read. And now there's an email asking them to "engage more"! Your team sees four unrelated little problems. The member sees one relationship that's hard work.

So here's the question I want you to ask:

When our delivery goes wrong, who does the extra work?

If the answer is usually the member, you've found something worth fixing.

THE TOUCHPOINT TALLY

A touchpoint is any moment a member meets your business. An email, a payment, a booking, a session, a resource or a support reply.

The Touchpoint Tally looks at each of those moments and gives it one of three labels:

LABEL	WHAT THE MEMBER EXPERIENCES	WHAT TO DO
CLEAR	"I know what to do, and I can do it."	Keep it. Recheck when details change.
COSTLY	"I can do it, but I have to search, guess or chase."	Remove the extra effort.
BLOCKED	"I can't do it the way you told me to."	Help the member, then fix the route.

A few tips for rating:

- **Rate it from the member's side.** If your regulars know a workaround for a broken link, it's still broken!
- **Write down what you saw.** "The reminder opened last month's meeting room" is fixable. "Members are confused" isn't.
- **Don't turn it into a score.** One Blocked route to something important matters more than ten Clear emails.

Follow a Task, Not a Department

Start with something a member is trying to do, like joining a live session, and follow it from the first email to the finish.

This matters because if you ask each department to check its own bit, everyone says “All good!” Marketing sent the email. Operations ran the session. Support replied to the ticket. All true… and Daniel *still* missed the session.

Take Off Your Owner Glasses

You know where everything lives, and that makes you the worst person to test it! So log in with a test member account. Open the real reminder email on your phone and follow the links exactly as they’re written.

Even better, watch a willing member try it. Tell them you’re testing the process, not them. And here’s the hard part: *don’t help*. The moment you say, “Just click the little icon at the top”, you’ve wiped out the very thing you came to see. Instead, ask: “What would you do next? Where would you look for help?”

Daniel’s Tally

TOUCHPOINT	WHAT WE SAW	TALLY
Invitation	Clear purpose, time zone and how to join.	Clear
Calendar entry	Has an old link to last month’s room.	Blocked
Reminder email	Another out-of-date link. He can’t get in.	Blocked
Community post	Has the right link, but he has to hunt for it.	Costly
Support reply	Offers the recording, not an answer to his question.	Blocked
Recording	Arrives on time and plays fine.	Clear for replay

Look how that changes the conversation at your team meeting. Instead of "Members need to read the announcements", you can say, "We gave them three different routes to the same session and didn't keep them in sync."

OWN IT, REPAIR IT, PREVENT IT, PROVE IT

When something goes wrong, work through these four steps.

1 **Own it**

Say plainly what happened and take responsibility.

2 **Repair it**

Help the member get what they missed. Don't wait until you've finished investigating!

3 **Prevent it**

Fix the cause, and everything that depends on it.

4 **Prove it**

Repeat the member's task to check the fix really works. And don't take "fewer complaints" as proof. People who have given up don't write in!

What Daniel's Reply Should Look Like

EMAIL TEMPLATE

Hi Daniel, we sent you an out-of-date link. You followed our reminder and couldn't get in, and I'm really sorry. Send me the question you'd prepared, and our host will answer it in the member support channel by Friday. Here's the recording too, although I know it's not the same as being there.

Notice what it *doesn't* say:

- **"You should have checked the community."** That makes him responsible for your mistake.
- **"Sorry for any inconvenience."** That sounds like you don't understand what happened.

One more thing. Check the host can *actually* answer by Friday before you promise it. A second broken promise is much worse than the first!

Fix the Source, Not Just the Symptom

An apology won't stop tomorrow's reminder sending the same wrong link. So decide where the correct event details live, list every email and template that uses them, update them all and give one person the job of keeping them in sync.

A Reply Isn't a Fix

Here's a trap. A member writes that a resource won't open. Your team replies in ten minutes… with a link to the same resource. Your response time looks amazing! But the problem hasn't moved.

So read what they've already tried. Ask for the one detail you need. And when you close the ticket, tell them what changed and what they can now do.

CHOOSE WHICH FIX COMES FIRST

Your first Tally will probably turn up more than you can fix this week. That's normal! Use three questions to decide what comes first:

SIDEBAR

THE TOUCHPOINT NOBODY DESIGNS: FAILED PAYMENTS

Remember the January group from Chapter 2? Two of the eight early departures never chose to leave. Their payments failed and their access was switched off. Run this route through the Tally. The task is "keep my membership going when my card expires."

- **The first notice.** Does it arrive *before* access is cut, and tell them what to do in one click, on a phone?
- **The update.** Can they change their card without a forgotten password or an email to support?
- **The grace period.** Without one, a card that expired on a busy Tuesday becomes a cancellation nobody chose.
- **Payment plans.** If someone is paying a high-ticket program in installments, a missed payment isn't always an expired card. Sometimes it's a member who has quietly stopped believing. Have a person reach out, and ask how the program is going before you talk about the money.
- **The personal follow-up.** "Looks like your card expired. Here's the link, and your access is safe until Friday" wins back people an automated email won't.

For many memberships, fixing this route is the fastest retention win there is, and nobody has to change their mind!

- **How much does it cost the member?** A broken route to paid support beats an awkward heading nobody reads.
- **How many people does it affect?** A wrong reminder sent to everyone beats one typo in one email.
- **Will it happen again?** A broken template will keep causing trouble until someone fixes it.

Then give the fix one owner, one date and a clear finish line. “Improve event communication” is a wish. “Replace the old link in the reminder template and test it before Thursday” is a job.

CLEAR THE ROUTE, NOT THE WORK

I’m not saying make everything effortless. Writing the draft or practicing the skill is often the whole point! Preparing a question before a feedback session is great effort. Searching four places to find out where to send it is wasted effort.

AT SCALE

with Marcus · Systems That Scale

In Marcus’s program, every important route has an owner: joining a session, getting help, sending in work, payments and canceling. Each month, one owner walks their route live at the team meeting, on a phone, while everyone watches. (Humbling. Also very effective.) The team also tracks two numbers. How many help requests are about *finding* something rather than *doing* something? And how many failed payments did they recover? When either number moves, someone walks the route again.

YOUR ACTION STEPS

1

Pick one route

Choose something members do often, or one you already know is a problem. Joining a session, finding a resource, asking for help or updating a card.

2

Write the result in one sentence

For example, “A member can use the reminder to join the right session on time.”

3

Walk it as a member

Use a test account, on your phone. Label each touchpoint Clear, Costly or Blocked.

4

Check your failed payment route

Seriously, do this one this week!

5

Pick one fix and run it through Own it, Repair it, Prevent it, Prove it

Give it a name and a date.

6

Make it a habit

Check one route at your team meeting each month. Rotate through joining, sessions, resources, support and payments.

QUICK RECAP

- Small delivery mistakes add up. The member experiences them as one relationship that's hard work.
- Always ask: when delivery goes wrong, who does the extra work?
- The Touchpoint Tally labels every step Clear, Costly or Blocked.
- When things go wrong: Own it, Repair it, Prevent it, Prove it.
- Check your failed payment route. It might be your fastest win.

Daniel did everything we ask members to do. He made time, he prepared and he showed up. Before you ask members for a bigger commitment, make sure they can rely on the one they've already made.

And here's something else about that Thursday. On your attendance report, Daniel is simply "absent". So is Sophie, who was busy with a new client. And so is Priya, who stayed away for reasons nobody has asked about. Three blank rows, three completely different stories. In the next chapter, we'll learn how to tell them apart.

EXECUTION · IS IT WORKING?

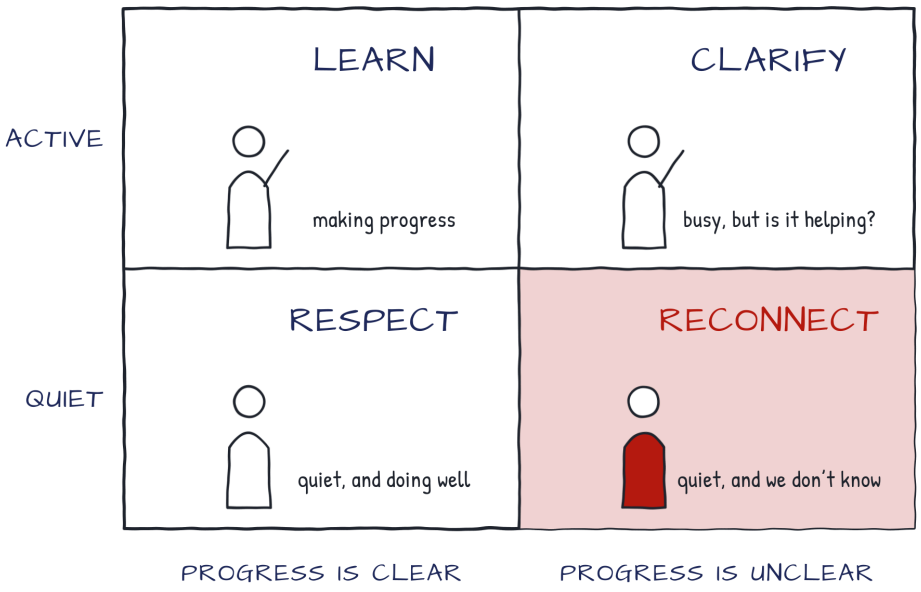
QUIET IS A TERRIBLE CHURN SCORE

THE BIG IDEA

A quiet member isn't necessarily a member at risk, and a busy one isn't necessarily getting value. To know who needs you, look at progress, not just participation.

IN THIS CHAPTER, YOU'LL LEARN

- Why "they just didn't engage" is a dangerous explanation
- The Quiet Member Matrix: four types of member and what each one needs from you
- How to write a check-in that people actually want to answer
- How to keep one clear record so members never have to repeat themselves



Two members have missed the last three calls. Neither has posted in the community. On your dashboard, they look exactly the same.

So you send them both the same message: “We haven’t seen you in a while! There’s so much happening inside the membership. We’d love to see you on the next call!”

Sophie reads it between client meetings. She watched a recording, tightened her proposal, sent it and won the work. She’s been busy doing *exactly* what she joined to do. Now she’s wondering if you think she’s using the membership wrong.

Jess reads it next to a question she sent twelve days ago. She finally sat down to finish her new wedding package, got stuck on the pricing and asked for help. Nobody answered. Now you’re inviting her to another call, as one more hoop to jump through before someone *might* help her.

Same dashboard. Completely different stories.

Imagine what you could have sent if you'd known.

To Sophie: "How did the proposal go? If the recordings are fitting into your week, let's keep that going!"

To Jess: "You asked for help with your pricing and we didn't answer. I'm sorry. I'll look at what you sent and get back to you by Thursday. You don't need to come to a call to get that answer."

You could never write either message from an attendance report.

"THEY JUST DIDN'T ENGAGE"

A cancellation arrives from someone you barely remember seeing. It's so easy to say, "Well, they just didn't engage." It's also a very comfortable explanation for the owner. We gave them the opportunity, they didn't take it, case closed.

But I want you to keep the case open a little longer. They might have struggled to find the right session. They might have stopped asking after a disappointing answer. They might have got exactly what they needed. Or their life might have changed in a way no amount of community activity could fix.

Here's the trap. If the same ten active members shape every decision, you'll keep improving the membership for those ten people. Meanwhile, your team chases happy members into calls they don't need, while someone like Jess waits for an answer that never comes.

THE MEMBER I THOUGHT WE WERE LOSING

I once put a member on my “we’re losing her” list. She rarely came to calls. I couldn’t remember her posting. Every time I saw her name on the billing report, I wondered if she’d forgotten she was paying us.

So I reached out and asked if she needed help “getting started again”.

She sent back a photo. It was a meeting agenda from one of our resources, printed out and covered in handwritten notes. She’d been using it with her team every single Monday. Before joining, she’d been answering the same questions all week. Now her team brought their questions to the Monday meeting, and she was finally getting through an afternoon without her phone constantly interrupting her.

I’d assumed that because I couldn’t see her doing anything *inside* the membership, nothing was happening *outside* it. Even my wording gave me away. “Getting started again”? She’d been putting what we taught into practice every week!

From then on, I stopped asking quiet members if they were okay and started asking what they’d used recently and what happened when they tried it.

WHAT DOES “ENGAGED” MEAN FOR YOU?

Before you try to increase engagement, decide what you’re actually counting.

- **A login** tells you someone opened the platform, not whether they found what they needed.
- **A completed video** tells you it played, not what they understood.
- **A comment** might be a thoughtful question or a "Thanks!" typed while the kettle boiled.

And attendance means different things in different memberships. In a conversation-practice group, speaking with other people *is* the service. In a resource library, someone might find exactly what they need in ten minutes and not come back for two weeks.

So start with the benefit members paid for. Then ask which activities actually help them get it, and which are just easy to count.

THE QUIET MEMBER MATRIX

The Quiet Member Matrix asks two questions at the same time:

1. How much participation can you see?

2. What do you know about their progress towards the thing they joined for?

That gives you four types of member, each with its own action:

PARTICIPATION	PROGRESS IS CLEAR	PROGRESS IS UNCLEAR
Active	**LEARN** Find out what's helping and what's next.	**CLARIFY** Ask what value they're getting.
Quiet	**RESPECT** Support the way that works for them.	**RECONNECT** Ask about their goal and remove the obstacle.

People move around the grid all the time, so treat it as today's view, not a permanent label.

Let's meet one member from each box.

Learn: Leah (Active and Progressing)

Leah comes to most sessions, asks questions about real work and reports back on what happened. This month she got her first referral from a local physical therapist, after practicing her pitch with another member.

Ask her, "Which part helped you make that change?" Maybe she understood the outreach lesson weeks ago, but only acted after a peer helped her practice saying it out loud. That's so useful, because now you know what to offer the next person.

Then ask what's next. A member can be doing brilliantly and still be outgrowing what you offer. (We'll come back to Leah in Chapter 10.)

Clarify: Ben (Active and Unclear)

Ben from the agency mastermind comes to every call. He chats with the facilitators and encourages newcomers. Ask the team who's getting value, and his name comes up first.

But when he joined, he said he wanted to take a full week off without the agency needing him. Three months later, the team knows exactly how many calls he's attended. Nobody has asked about the week off!

So ask, privately: "When you joined, you wanted to take a week off without the agency needing you. How close are you? Is that still what you'd like help with?"

He might be delighted with his progress. He might have new priorities. Or he might be coming to the hot seats he enjoys and quietly skipping the sessions on

delegation. An active member deserves more than the assumption that everything must be fine.

Respect: Sophie (Quiet and Progressing)

Sophie rarely comes to live sessions now. She watches the recordings she needs, uses the templates and sends the occasional question. In the community, you'd barely know she exists.

But ask about her work, and she'll tell you she's used the proposal template with two prospects and won one of them.

So ask how she likes to use the membership: "It sounds like the recordings and the occasional question are working for you. Would a quick check-in after your next proposal be useful, or would you rather get in touch when you need us?"

Then honor her answer. There's no prize for dragging a happy member onto a call she doesn't need!

Reconnect: Priya (Quiet and Unclear)

Priya, who'd just started renting her first chair, has stopped coming. The last thing anyone knows is that she was about to post her first price list and an intro offer. Since then, silence.

You *could* send "We miss you!" or a reminder of all the content waiting for her. Or a message about how successful members show up consistently. (Please leave that last one in drafts!)

Instead, use the last real thing you know: "You were about to launch your intro offer. How did it go? If something got in the way, I'd love to help you work out the next step."

Priya writes back. She posted the offer, got two bookings when she'd hoped for twenty and decided she must have priced it wrong. She thought her question was

too basic for the group, so she stopped opening your emails because each one reminded her of it.

Now you've got something you can help with! And you've learned something about your membership too. If your community mostly celebrates wins, everyone else is left wondering if they're the only one struggling. Find ways to make it normal to say, "I tried this and it didn't work."

HOW TO WRITE A CHECK-IN PEOPLE WANT TO ANSWER

A good check-in has three parts:

1. Remember their goal.

2. Ask what happened.

3. Offer one useful next step.

Keep it short enough for a busy person to answer in one line.

Match the Message to What You Know

WHAT YOU KNOW	A GREAT OPENING LINE
Their goal, but no recent update	"You were planning to send your first pitch. How did it go?"
They come a lot, but you're not sure it's helping	"You wanted to take a week off. How close are you?"
They're making progress through recordings	"Is that way of working still suiting you? What would help next?"

WHAT YOU KNOW	A GREAT OPENING LINE
You missed their request for help	"We missed your question. I'm sorry. I'll answer it by Thursday."
You don't know their goal	"What were you hoping this membership would help you do?"

And if they're avoiding calls because they feel behind, take the pressure off: "You don't need to catch up on the old recordings first. Bring your draft as it is, and we'll work on what you need now."

When Nobody Replies

One gentle follow-up is plenty. "Just bringing this back up in case it got buried. A one-line reply is perfect!" After that, leave the door open and note when you'll check again.

The exception? If *you* owe *them* something. If you failed to deliver, fix it whether they reply or not. Send the feedback. Fix the resource. Tell them it's done.

And if a check-in turns into a request to cancel, process it. A progress chat should never be a condition of leaving.

ONE MEMBER, ONE RECORD

Here's a very common problem. You know Sophie prefers recordings. The community host knows Priya asked a question. And then an automated "we miss you" email goes out to both of them anyway!

Your members experience *one* company. They shouldn't have to explain themselves every time someone new replies.

So keep one simple member record with:

- Their goal, in their words
- What they've tried
- Their latest real update, with the date
- What's missing or still unknown
- The next action, and who owns it

And keep facts and guesses apart. "Missed two sessions; reason unknown" is honest. "Doesn't care" is a story someone made up.

One more thing. "We should check on Priya" can survive a surprising number of team meetings without anyone actually doing it. "Alex will reply to Priya by Thursday" gives someone a job.

A Word About Automation

Automation is brilliant at *noticing* things, like the weekly regular who suddenly disappears. But let that alert prompt a person to look, not an automatic message. A missing login could mean a tech problem, a vacation or that they're doing brilliantly on their own. The platform can't tell the difference. You can.

AT SCALE

with Marcus · Systems That Scale

With 600 members, Marcus's team can't place everyone in the matrix by hand. So the data does the first sort, and people make the call. The platform shows participation. For progress, the monthly check-in form asks one question: "What's one thing you've done with what you learned this month?" A blank or "nothing yet" puts someone in the unclear column. Every Monday, each coach gets a short list, starting with the Reconnect box. The team calls it a health score. A red score sends a person to look, never an automated email.

YOUR ACTION STEPS

1. **Choose five members**
   One active, one quiet, one whose participation has changed, one you haven't heard from lately and one you *think* you understand well. (That last one is worth testing!)

2. **Write down two things for each**
   The benefit they joined for, and the most recent real update, with its date.

3. **Place them in the matrix**
   Learn, Clarify, Respect or Reconnect.

4. **Send one check-in today**
   Use the three-part structure: their goal, what happened and one next step.

5. **Update the record**
   Then do whatever you promised.

6. **Check your automations**
   Are any of them sending "we miss you" messages to members who are doing just fine?

QUICK RECAP

- ✓ Quiet doesn't mean at risk. Busy doesn't mean getting value.
- ✓ The Quiet Member Matrix: Learn, Clarify, Respect or Reconnect.
- ✓ A great check-in remembers their goal, asks what happened and offers one next step.
- ✓ Keep one record per member, so nobody has to repeat themselves.
- ✓ Let automation notice things, but let people respond.

Go back to Sophie and Jess. The dashboard still shows the same three missed calls. But now you know one is doing brilliantly and the other was left waiting. You can respect the first and make it right with the second.

There's one more thing to prepare for. Ask Sophie what the membership has done for her, and she might struggle to answer. She'll remember the calls she missed more easily than the proposals she now writes in half the time. In the next chapter, we'll fix that.

EXECUTION · IS IT WORKING?

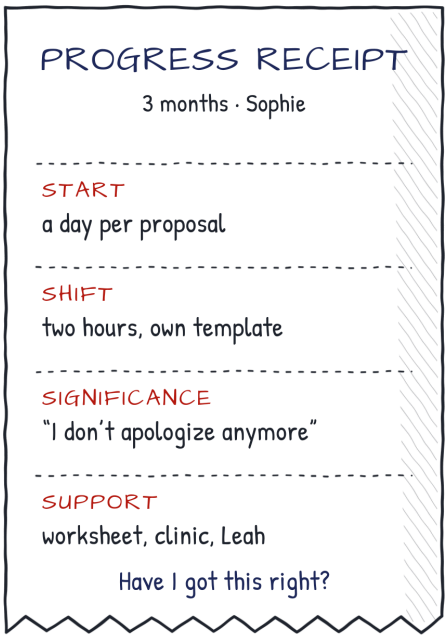
SUCCESS HAS A SHORT MEMORY

THE BIG IDEA

Members quickly forget how far they've come. If you don't help them see their progress, they'll judge your membership on the sessions they missed instead.

IN THIS CHAPTER, YOU'LL LEARN

- Why members say "I haven't used it enough" even when it's working
- The Progress Receipt: four parts that capture a member's real progress
- What to do when the receipt is disappointing
- How to make recognizing progress part of your normal delivery



"Honestly, I haven't used it enough."

Sophie says it eleven minutes into her three-month review call. She sounds a little guilty, like someone owning up to an unused gym membership. She's missed the last three Thursday clinics. A new client kept her busy, and she's been meaning to catch up on the recordings.

Grace, who hosts the clinics, has Sophie's welcome form open in another tab. She *could* list the next six sessions. But that would just give Sophie six more things to feel behind on.

Instead, she asks, "When you joined, you said a proposal took you most of a day. How long did the last one take?"

Sophie pauses. "About two hours, I suppose. I've got a template now."

"And the fee you were nervous about?"

"Oh. I don't really think about that anymore. I just send it."

Nothing about the membership changed in those five minutes. What changed was what Sophie could *see*. A moment ago, she was judging three months by the sessions she'd missed. Now she's looking at how differently she works because she joined.

WHEN BETTER BECOMES NORMAL

Ask a member what's hard today, and you'll get lots of detail. Ask what was hard four months ago, and things get fuzzy. The process they learned now feels obvious. The decision that used to stop them happens without a second thought.

That's the whole point! You *want* the change to become part of their life. But if nobody wrote down where they started, they've got nothing to compare it with. So they fall back on the easiest comparison there is: what they paid versus what they attended.

Look at the difference between these two updates:

- **"You attended four sessions this month."**
- **"Three months ago, a proposal took you most of a day and you were apologizing for your fee. This month you sent two in an afternoon, and one client paid for an extra round."**

The first is an activity log. The second connects what she did to what she wanted.

Here's a question for you. Can you describe the *difference* your membership makes as clearly as you can describe what's *included*? Most owners can walk me through their calendar in their sleep. Far fewer can tell me what it's helping members do.

THE OLD DANCE RECORDING

A student at my dance studio once told us she didn't think she was getting any better. She was struggling with a new routine. There was one turn she couldn't land, and other students seemed to be picking it up faster.

Her teacher could see how much she'd improved. But telling her that wasn't helping. She knew exactly what she *couldn't* do.

So we showed her a recording from an earlier performance.

At first she laughed. She'd forgotten that costume! But as she watched, she noticed how often she'd looked sideways to check what came next. In the new routine, she knew whole sections without watching anyone. When she made a mistake, she could find her way back.

"I remember thinking that dance was *really* hard," she said.

It had been. Now she was treating those same skills as the basics everyone could do.

The tricky turn still needed work. The recording didn't change that. But it reminded her that she'd learned hard things before, things she no longer even remembered struggling with.

I'd assumed improvement would be obvious to the person doing the improving. It isn't. They're always focused on the next thing they can't do yet.

THE PROGRESS RECEIPT

A receipt records something specific. It doesn't need to be fancy. It just needs to be accurate.

The **Progress Receipt** is a short, dated record of the change a member has experienced, checked with the member. It has four parts:

PART	THE QUESTION IT ANSWERS
START	What did they want, and what was happening when they joined?
SHIFT	What's different now, and what's an example?
SIGNIFICANCE	Why does that difference matter to *them*?
SUPPORT	What helped? What's still needed? What happens next?

1 **Start**

Go back to why they joined. "I want to grow my business" is a direction. "I keep putting off raising my prices for my existing clients" is something you can come back to. If you don't have a starting record, ask what they remember, and call it a memory, not a measurement.

2 **Shift**

What's changed? "Things are going well" is a mood. Look for something they can show or describe: a finished piece of work, a new habit, a different decision.

3 **Significance**

Don't decide what it means for them. Ask: "What has that made easier?" Then use *their* words. They'll describe the value better than any marketing copy you could write.

4 **Support**

Ask three things, in this order: What helped? What's still hard? What's the next step? Ask what helped *before* you mention the membership. You want the real picture, including their own effort.

THE GOLDEN RULE

Always send it as a question. "Here's what I heard. Have I got this right?" If they correct you, that's not a problem. It's the gap between your view and theirs, handed to you on a plate.

HOW GRACE FINISHED SOPHIE'S CALL

Grace worked through the four parts, one at a time. **Start** was already on Sophie's welcome form, so Grace just checked it with her. **Shift** came from asking about her last two proposals.

Significance Grace didn't fill in herself. She asked, "What has that made easier?" Sophie thought about it. "I don't apologize for my price anymore." That line went into the record, word for word.

Support took the longest. Sophie named the scope worksheet, the early clinics, Leah's read-throughs and, a little sheepishly, the quiet month that gave her time to build her template. What's still hard? Following up when a prospect goes silent. So she'll bring one of those emails to the next clinic.

Sophie's Progress Receipt

PART	THREE MONTHS IN
START	Joined with a proposal due on Friday and a fee she was worried about. Remembers proposals taking most of a day.
SHIFT	Last two proposals took about two hours each, using her own template. Both included a revision allowance. One client paid for an extra round.
SIGNIFICANCE	In her words: "I don't apologize for my price anymore."
SUPPORT	Helped: the scope worksheet, the clinic, Leah's read-throughs and a quieter month. Still hard: following up when prospects go quiet. Next: bring a follow-up email to Thursday's clinic.

Then Grace sent Sophie a short email:

EMAIL TEMPLATE

Hi Sophie, three months ago you came to us with a proposal due on Friday and a fee you were nervous about. Your last two proposals took about two hours each, both had a revision allowance, and one client paid for an extra round. You said the worksheet, the clinic and Leah's read-throughs helped. The line that stood out for me: "I don't apologize for my price anymore." Next up is following up with prospects who go quiet, so bring one of those emails on Thursday. Have I got this right? What would you change or add?

See how it remembers where she started, shows the change, shares the credit and ends with a question? Sophie can correct any part of it.

PROGRESS ISN'T ALWAYS A BIGGER NUMBER

Not every membership is about a measurable result. The receipt has to fit what you promised.

Take **Rosa**, who subscribes to an online Spanish program. Three months in, she tells her tutor she's "still hopeless". She can't follow the TV shows she wanted to watch, and she forgets half the words she learns.

But on her first day, the program asked her to record a one-minute voice note introducing herself. So her tutor sends it back to her. Rosa hears herself pausing after every second word, then switching to English to say she doesn't know the word for "job". That afternoon, she records a new one. Ninety seconds, no English, and she talks about her job *and* her weekend.

She still can't follow the TV shows. But now she knows she's moving.

- **In a hobby club,** the progress might be that a member takes her camera out regularly and feels fine arriving at outings on her own.
- **In a habit or accountability membership,** like a writing group, it might be that the routine survived a crazy month. Just write that down. Don't claim they would have given up without you, because you don't know that.
- **In an access membership,** it might simply be that help was there when it mattered.

WHEN THE RECEIPT IS DISAPPOINTING

Sometimes there isn't much progress to record. Don't cover that up with more enthusiastic language!

Remember Jess, who waited twelve days for an answer in the last chapter? Her honest receipt might say:

> **EXAMPLE WORDING**
>
> When you joined, you wanted to finish your new wedding package and send it to couples. That hasn't happened yet. You sent us the pricing section for feedback, and we missed our reply date. We need to fix that before asking anything more of you. Grace will send you the feedback by Thursday, and then we'll check whether it gives you what you need.

It's not a fun email to write. But it's honest, and Jess will know you mean it.

A receipt has to be allowed to say "not yet", "this didn't help" and "we need to change something". Otherwise, it's just a sales document wearing a helpful hat.

MAKE IT PART OF HOW YOU DELIVER

If the first time you remind someone of their progress is *after* they've asked to cancel, it's going to sound defensive. So build it in early, at moments that make sense: after they try a new skill, finish a stage or reach an agreed review date.

A few tips:

- **Match the timing to the change.** Don't ask for a transformation every 30 days just because your billing runs monthly!
- **Use what you already know.** If they've already told you about a win, add it to the receipt and ask them to confirm it.
- **Start with one question.** "You were going to try the new approach with your next client. What happened?"

A Receipt Is Not a Testimonial Request

Keep the progress conversation about *them*. If you'd love to share their story publicly, ask separately, later. Members need to feel safe saying, "That helped, but this other thing still isn't working." They won't say that if they think it's heading for your sales page!

And match the recognition to the person. Some people love a public shout-out. Others would much prefer a specific, private word.

AT SCALE

with Marcus · Systems That Scale

Eight coaches can't write 600 receipts from scratch. So at 90 days, Marcus's members get a short form with the four parts as questions. Where were you when you joined? What's different now? What has that made easier? What helped, and what's next? Their coach reads it, adds one line and sends it back as a question. Six months in, the team noticed what kept appearing under Support: the pods (small group sessions), far more than the masterclasses. That changed where next year's budget went.

YOUR ACTION STEPS

1 **Choose one member**

who recently told you about a meaningful change.

2 **Draft their receipt**

Fill in Start, Shift, Significance and Support from what you already know. Leave the gaps as questions. Give it fifteen minutes, tops.

3 **Send it as a question**

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

4 **Update and follow through**

Correct the record, and do whatever you agreed.

5 **Try one with a member whose progress is unclear**

A good process helps you understand a disappointing experience as well as a happy one.

6 **After five receipts, look for patterns**

Which parts of your offer keep helping? Which problems keep coming up?

QUICK RECAP

- ✓ Members forget how far they've come. Better quickly becomes normal.
- ✓ The Progress Receipt has four parts: Start, Shift, Significance and Support.
- ✓ Always send it as a question, and use the member's own words.
- ✓ An honest receipt can say "not yet", and that's valuable too.
- ✓ Build progress conversations into delivery, long before renewal time.

If Grace had answered "I haven't used it enough" with the clinic schedule, Sophie would have hung up feeling behind. And that's the feeling she'd remember when the renewal came around. Instead, she has her own words about what changed, and a reason to come to Thursday's clinic.

But what happens when a member's receipt is *so* good there's nothing left to do? When she got exactly what she came for? That's the conversation we turn to next.

EXTENSION · IS IT STILL WORTH IT?

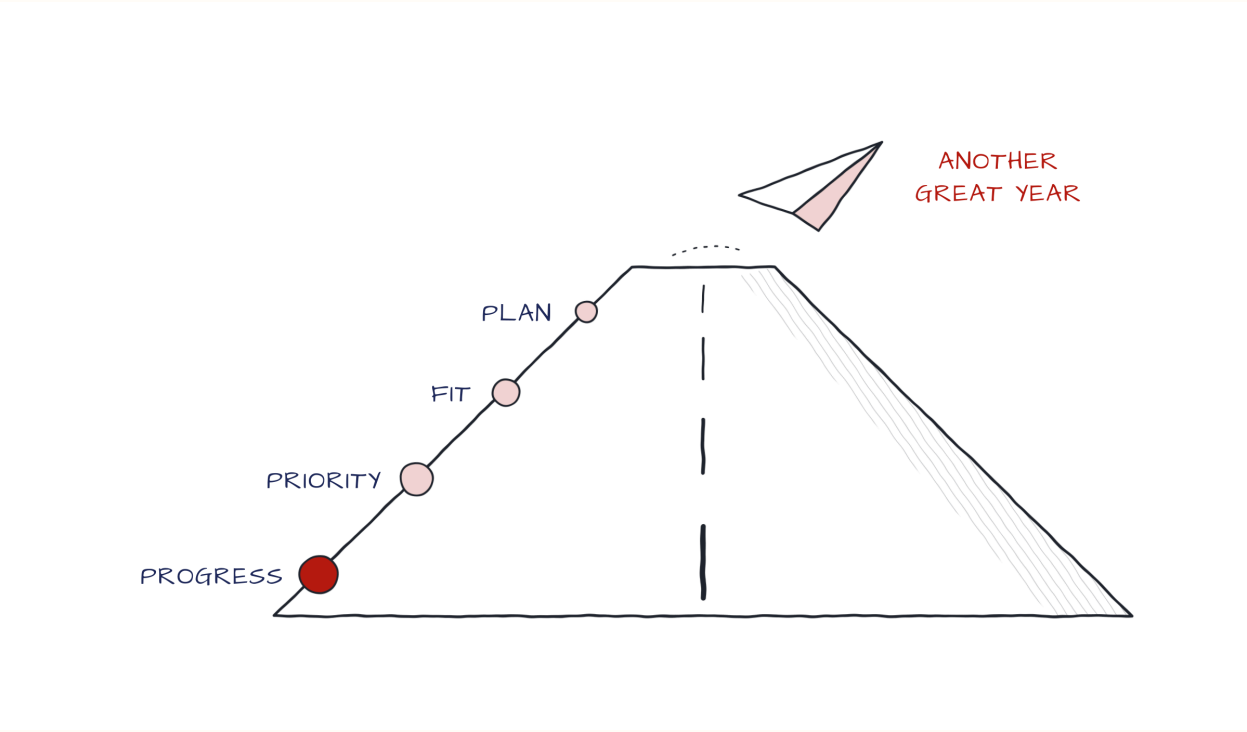
THE MEMBER WHO DOESN'T NEED YOU ANYMORE

THE BIG IDEA

Past value earns appreciation. Future relevance gives members a reason to stay. When a member succeeds, their needs change, and your recommendations have to change with them.

IN THIS CHAPTER, YOU'LL LEARN

- Why your happiest members are often the ones who leave
- When to let a member finish (and why that's good for business)
- The Renewal Runway: four steps for a renewal conversation that actually helps
- How to handle price, timing and annual renewals



The cancellation email is lovely. That's what makes it hard to read.

"Thank you for everything! I joined because I needed help getting my business off the ground, and I finally feel like I've done that. I've decided not to renew, but I'll definitely recommend you."

No complaint. No failed payment. No argument about price. You delivered, and they're leaving anyway.

Your team immediately starts reaching for something to offer. An extra call? A discount? A reminder of all the resources they haven't watched yet?

But the member didn't say it was too expensive. They didn't ask for more videos. They said the reason they joined has been met. The real question is whether there's a good reason to continue, and that question deserves your attention long before this email arrives.

SUCCESS CHANGES THE JOB

People join with a particular problem. You build your support around it. And then, if you've done your job well, they change!

Someone who needed confidence to make their first sale now needs to manage a full calendar. Someone who came for the basics now wants to practice with more experienced people.

Your beginner program might still be brilliant. But the member has moved on. So look at your calendar through their eyes. How much of it speaks to who they are *now*? How much still assumes they're the person who joined?

Past value earns appreciation. Future relevance gives them a reason to stay. You need both.

SOME MEMBERS SHOULD FINISH

Let's get this out of the way first. Some members *should* finish.

If someone joins for a defined result, gets it and has nothing else you can sensibly help with, a good ending is the right outcome. You don't need to invent a new

weakness for them to work on because your revenue forecast would like another payment!

In fact, a membership that lets people finish well earns word of mouth that no campaign can buy. “They helped me, and when I was done, they let me go” is a sentence that brings in your next five members.

But there’s a difference between a member who has outgrown your *offer* and one who has outgrown the *version* of your offer they know how to use. The first may need to leave. The second might just need to be shown a part of your membership they’ve never noticed.

“I Want to Enjoy This for a While”

A member once told me she didn’t think she needed us anymore. My first instinct? Think of everything we hadn’t helped her with yet. More training. New goals. Other parts of her business.

When she joined, she wanted to hand the day-to-day running of her business to a manager. She was tired of being needed before anything could happen. By the time we spoke, the manager was in place, and she could take a day off without spending it answering messages.

So I asked what she wanted to work on next.

She said she wanted to *enjoy this* for a while.

I’d been ready with growth ideas. She wanted to pick up her kids, have dinner and stop turning every spare hour into another business project. That was exactly what she’d told us she wanted at the very start.

So we talked through what she’d put in place and what still needed her attention. Then we helped her finish her membership well.

Was I entirely comfortable watching that payment stop? No! But I'd handle it the same way again, with one change: I'd spend less time preparing suggestions before hearing her answer. "What would you like next?" has to leave room for someone to say, "More time living like this."

THE RENEWAL RUNWAY

This is the final phase of RetentionCode, **Extension**. It answers the member's last question: *Is it still worth it?*

To have that conversation well, I use the **Renewal Runway**. It has four steps, and the order matters:

STEP	THE QUESTION	WHAT TO WRITE DOWN
PROGRESS	What's changed?	Their original goal, what they've achieved and what's unresolved.
PRIORITY	What matters now?	One current priority, in their words.
FIT	Can we genuinely help with that?	A route you already offer, and its limits.
PLAN	What happens next?	Their decision, the first action, who does what and a review date.

Start with the Plan and the conversation becomes a sales pitch. Stop at Progress and you've had a lovely celebration with no reason to continue. You need all four.

1 **Progress**

Open their Progress Receipt from Chapter 9 and ask if it still fits. Nobody should have to retell their whole story because a renewal is coming up. And if the original promise *hasn't* been met, find out why before offering a shiny new goal.

2 **Priority**

Don't ask, "What would you like to achieve with us next?" That ties you to the answer before you've heard it. Try these instead:

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

Write their priority in their words. "Keep my client work under control without giving up every weekend" is far more useful than "Unlock the next level of growth".

3 **Fit**

Be honest. Can your offer support that priority? Can they actually use it? Can you deliver it at the price you charge? If the answer is no, say so. That's part of being trustworthy.

4 **Plan**

Make it concrete. What will they use, what will they do, what will you provide and when will you check in? Keep the billing details (amount, date, how to change) separate and clear.

LEAH'S RUNWAY

Remember Leah? She's the chiropractor who helped Jess and swapped "what's included" wording with Sophie. She joined to fill her appointment book. Now it's full, and her annual renewal is coming up.

She likes the membership. She's also tired of invitations to sessions about finding your first client!

"Honestly, I don't think I need this anymore," she tells the membership manager. "It's been great. But my books are full now."

This is the moment to get curious, not to list everything she hasn't used.

Progress. "You joined to fill your books. It sounds like that part's going well. What helped?" Leah talks about practicing her referral pitch and two introductions from a former colleague. The manager writes down both.

Priority. "Now that you've got the patients you wanted, what's got harder?"

Leah laughs. "Doing it all! I wanted a full calendar. Apparently I also wanted to work every evening." She wants to finish work when she says she will. And no, she doesn't want to hire another chiropractor.

Fit. The membership already runs a monthly planning clinic on workloads and boundaries. Leah has never been.

"I've seen those emails," she says. "I thought that was for people planning how to grow."

That one sentence told the manager everything. The help already existed. The way it was described had made Leah rule herself out!

The next clinic falls within her current membership, so she tries it before deciding. Afterwards, she says it showed her how much work she'd taken on without making room for it.

Plan. Leah renews. She'll use the clinic to build a realistic weekly schedule and test one change to how she books new patients. The manager books a six-week check-in.

LEAH'S RUNWAY	WHAT THEY AGREED
Progress	A full appointment book. Her original need has been met.
Priority	Keep her workload manageable and protect her evenings.
Fit	The existing monthly planning clinic.
Plan	Renew, attend the clinic, test one scheduling change, review in six weeks.

Leah's reason to *join* was filling her appointment book. Her reason to *stay* is keeping it manageable. Nobody had to build anything new. Someone just had to ask a better question.

And the manager took something back to the team. From now on, clinic invitations would mention workload planning, not just growth. One conversation uncovered a problem that was probably keeping other experienced members away too.

Ben's Runway

The same four steps work in a mastermind. Ben's twelve-month renewal is coming up.

- **Progress:** In month eight, he took a full week off, and the agency ran without him. Goal achieved!
- **Priority:** He doesn't want to grow his team. He wants to protect the time he's won back.
- **Fit:** The weekly hot seats now feel like they're for owners at an earlier stage. But the program also runs a smaller alumni circle that meets monthly.
- **Plan:** Ben moves to the alumni circle at a lower fee, with a review after three months.

The business keeps Ben, at a lower price, because it asked what he needed *now* instead of automatically renewing him into a program he'd outgrown. That's much better than losing him in month thirteen.

WHEN THE PRICE IS THE PROBLEM

Sometimes the honest reason really is money. If someone says, "I love it, but I can't justify it right now", believe them.

If you have a genuine lower-cost option, like a lighter tier, a pause or a less frequent format, tell them about it once, clearly. If you don't, say so kindly and help them finish well.

What I *wouldn't* do is offer a discount you'd never give a new member. It teaches people that the way to get a better price is to threaten to leave. And it quietly tells everyone paying full price that they're overpaying.

Raising Your Prices?

Treat it as a Renewal Runway conversation, not a billing notice:

- **Tell people early,** well before the change.
- **Explain what the money pays for,** in terms of what they use.
- **Show them their progress.** A price rise lands very differently when someone can see what the membership has done for them.
- **Give long-standing members a clear choice:** stay at the new price, switch to an option that suits them better, or leave on good terms.

Some will go. But far fewer will go angry, and the ones who stay will know why.

PAUSES, PAYMENT PLANS AND CONTRACTS

A few practical decisions shape your renewals more than most owners realize.

Monthly or annual? An annual commitment gives members time to get results before they decide, and gives you time to deliver. But it can also hide problems until the renewal date. If you sell annual programs, start the Renewal Runway on time, and keep an eye on Progress Receipts in between.

Paid in full or in installments? Installments make a high-ticket program much easier to say yes to. Just remember that a payment going through isn't a decision to stay (more on that below). And a missed installment often means a member who's lost faith, not a card problem. Talk to them first.

Pauses. A pause works when the reason is temporary and specific, like a new baby, a busy season or an injury. Agree a restart date and what they'll pick up first when they're back. A pause with no end date is usually just a slower cancellation.

A lighter option. Like Ben's alumni circle, this is for members who got what they came for and want to keep something going. Build it around what experienced members actually use. Don't just take the beginner program and remove bits.

Refunds and guarantees. Whatever your policy is, write it in plain words before people pay, and follow it without making anyone argue. If someone disputes a charge with their bank, treat it like any other goodbye: confirm, fix what you can and add it to your Exit Sort. (And check your contracts with someone who knows the consumer laws where you operate. I'm not a lawyer.)

START BEFORE THE INVOICE DOES

An annual renewal reminder is a terrible place to discover that a member no longer knows why they belong!

For annual memberships, start the conversation about eight weeks before the decision date, agree a plan by about six weeks out, and give them time to try the support before they decide, just like Leah did.

For monthly memberships, don't run formal renewal chats every few weeks. You'll exhaust everyone! Use real moments instead: they finish the beginner pathway, reach their goal, tell you their circumstances have changed, or say the current activities don't fit anymore.

TWO MORE THINGS FOR EXPERIENCED MEMBERS

Make room for staying where they are. Not everyone wants the next level. "I want this to stay a reliable part of my week" is a perfectly good reason to stay.

Describe that benefit plainly: regular practice, a peer group, help with a recurring job. Not “You can’t afford to stop investing in yourself”!

Don’t turn them into unpaid staff. Mentoring can be wonderful for experienced members, but only if they want it. Their renewal should never depend on taking a job they didn’t sign up for. Often they just want a room with peers where nobody has to explain the basics.

COUNTING ANNUAL RENEWALS PROPERLY

A quick note on math. If 20 members were due to renew in June and 15 renewed, your June renewal rate is 75% (15 out of 20). Not 15 out of everyone who paid you in June!

And if someone pays an annual membership in monthly installments, a payment going through in month three is just an installment. It doesn’t mean they happily chose you again that morning.

AT SCALE

with Marcus · Systems That Scale

Marcus puts renewals on a calendar, not on goodwill. Every month, his success team pulls the annual members whose renewal date is eight weeks away, and each one goes to a named coach. They track two things: the renewal rate, and how many renewals came with a written Plan. And every quarter, Marcus reads the most common Priority answers himself. One year, they told him experienced members wanted a peer group, not more training. That became his alumni program.

YOUR ACTION STEPS

1. **Choose one member**
   who's coming up to a renewal or has reached their goal.

2. **Open their Progress Receipt**
   If they don't have one, start there.

3. **Have the conversation**
   Work through Progress, Priority, Fit and Plan, in that order. Listen to their answer before preparing suggestions.

4. **Write down their priority in their words**
   Then check honestly whether you can help with it.

5. **Agree on a plan,**
   including a review date. Confirm the billing details separately.

6. **Look for patterns**
   After a few conversations, are members asking for help you already offer but describe badly? Fix the description. Asking for something you don't offer? Test it before you promise it.

QUICK RECAP

- ✓ Your happiest members can leave because the reason they joined has been met.
- ✓ Some members should finish, and letting them go well brings in new members.
- ✓ The Renewal Runway: Progress, Priority, Fit, Plan. In that order.
- ✓ Write the member's new priority in their words, and be honest about fit.
- ✓ Start renewal conversations early, and never discount just to stop someone leaving.

Go back to that lovely cancellation email. Maybe there's nothing to rescue. Maybe they got what they came for, and you can be proud of that! But if you never asked what matters to them now, you don't know whether they're finished with your help, or just finished with the version of it you keep showing them.

Some members will still choose to leave. And how you handle that moment is the last part of the promise.

EXTENSION · IS IT STILL WORTH IT?

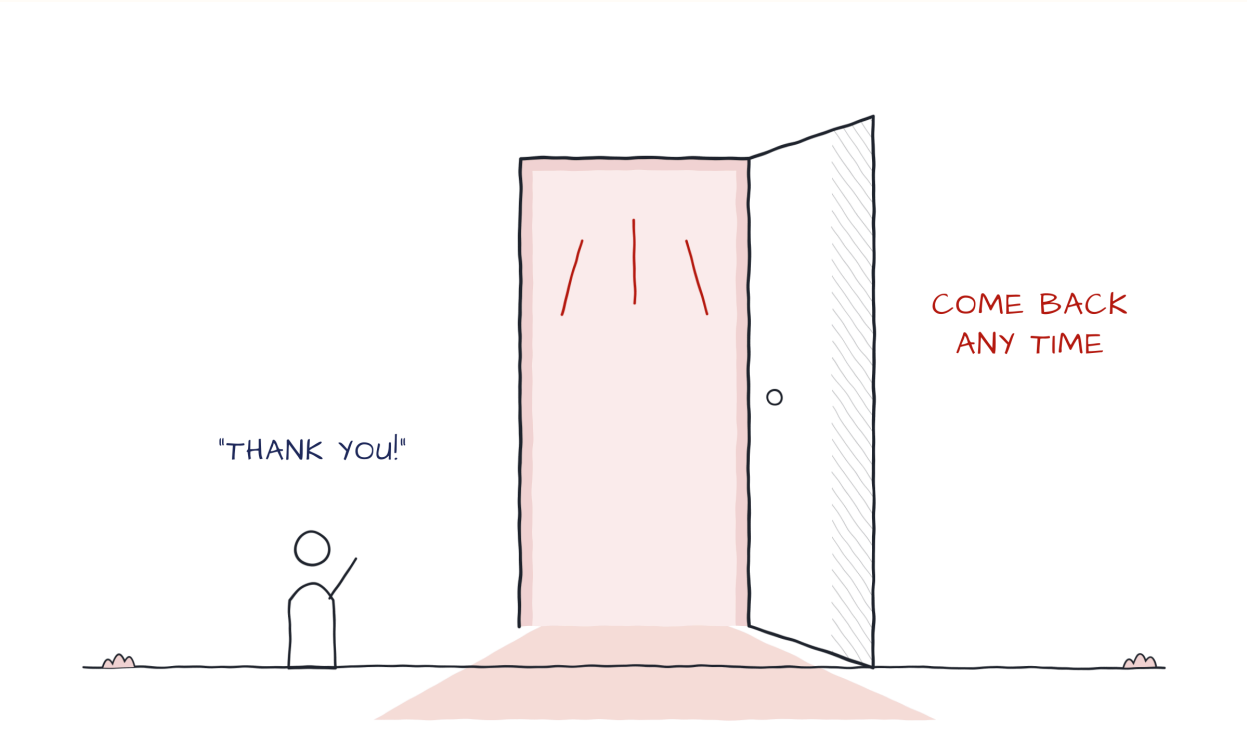
LEAVE THE DOOR OPEN

THE BIG IDEA

How someone leaves is the last part of their experience with you. Make leaving as easy as joining, learn something from every goodbye, and leave the door open.

IN THIS CHAPTER, YOU'LL LEARN

- Why making it hard to leave backfires
- The golden rule: confirm first, ask second
- The Exit Sort: five categories that turn goodbyes into improvements
- How to leave the door open without chasing people



They were happy to join. You made that part easy!

The sales page explained everything. The payment went through. The welcome email arrived before they'd even closed the browser.

Now imagine the same member trying to leave.

The account page says to email support. Support sends a form. The form asks them to book a call. And the next available call is after their next payment date.

Somewhere inside the business, this is called a "retention strategy".

From the member's side, it's an obstacle course. Sure, you might squeeze out one more payment. But you'll also change the story they tell about every payment that came before it.

THE LAST EXPERIENCE STILL COUNTS

It's very easy to become less interested in someone once they stop being future revenue. The replies get shorter. The helpful person disappears. The language switches from *their goals* to *your terms*.

Members notice.

People leave for all sorts of reasons: a disappointment, a change in their life, a finished goal or simply deciding to spend the money elsewhere. You won't always agree with the reason. But you still have work to finish. Tell them what happens next and when. Deliver anything you still owe them. And nobody should need three emails to find out if you got their request!

THE LITTLE DANCER WHO CAME BACK

A parent once emailed our dance studio to say her daughter wouldn't be back next season. Their family schedule had changed, and getting to class had become too hard.

I was disappointed. Her daughter had settled in, made friends and was really growing in confidence. I could think of plenty of reasons to encourage them to stay.

But the parent hadn't asked me to help rearrange their week. She'd asked us to end the enrollment.

So we confirmed her daughter's final class and what was left to pay. We also told her teacher, so the little one could finish properly instead of just disappearing from the attendance sheet. At the last class, her teacher told her how much she'd loved

teaching her and mentioned something she'd really improved at that month. No speech about how much she'd miss out on by leaving.

Months later, the mom got in touch about a different class time. And what stayed with me was her relief that coming back felt easy. She didn't have to explain herself or wonder if we'd be annoyed with her.

Nobody had made leaving feel final, so coming back was easy.

CONFIRM FIRST, ASK SECOND

You met this rule back in Chapter 1, and it matters most right here. When someone asks to leave, process it and confirm the details *before* anything else: their access, their payments and anything they can keep. Don't hold it up for a feedback form or a sales chat.

For Anna, the mechanic from Chapter 1 who left to care for her mom, it might look like this:

EMAIL TEMPLATE

Thanks for letting us know, Anna. Your cancellation is confirmed. Your access continues until August 31, and there won't be any more payments. Before then, you can download your worksheets from your account. I hope your mom's doing well. And thank you for sharing your Friday admin checklist with the group. It helped more people than you'd think.

Notice there's no question at the end. Anna told you why she's leaving, so there's nothing to ask. Wish her well and let her go.

For everyone else, you can add one optional question *after* the confirmation: "If you're open to sharing, what most influenced your decision to leave? A sentence is

plenty." If they don't reply, write down "unknown". Silence isn't proof that the price was wrong!

And if they've told you something that a genuine option you already offer could solve, like a pause or a lighter plan, mention it once, in the same email: "Your cancellation is confirmed. We also have a lighter option with fewer sessions, which might suit the change you mentioned. Just reply if you'd like the details." Then leave it. Never make canceling the only way to get a real conversation.

THE EXIT SORT

In Chapter 1, the Cancellation Rewind helped you understand *one* goodbye. The **Exit Sort** helps you see what *all* your goodbyes are telling you, so you know what to fix.

It has five categories:

CATEGORY	WHAT IT MEANS	WHAT TO DO
DELIVERY	Something you promised fell short.	Fix it for them, then fix the process.
FIT	The offer doesn't suit them right now.	Point them to a better option you offer, or accept it.
CIRCUMSTANCES	Something outside the membership changed.	Respect it, and wish them well.
COMPLETION	They got what they came for.	Celebrate it and help them finish well!
UNKNOWN	You don't have enough information.	Keep the gap visible. Don't guess.

Three tips:

- **More than one can be true.** A busy season *and* a delivery problem can both be part of the story.
- **Keep their words next to your label.** “I can never make the sessions” is what they said. “Fit: schedule” is your interpretation. If you advertised sessions at a different time, it’s Delivery!
- **Give failed payments their own column.** A failed card doesn’t tell you *why* someone left, so don’t mix it in with people who chose to go.

THE CANCELLATION WE MISREAD

Remember Mel? When she canceled, the team typed “Time” next to her name and moved on. At first glance, that’s Circumstances. Nothing to fix.

But her Rewind in Chapter 1 told a different story. She’d missed a Thursday and couldn’t find anywhere to send her quote for feedback, which was the very thing she’d paid for. So her record changes to **Delivery**, with her original words kept right next to it as the evidence.

The team offered to review her quote anyway, but it had already gone out. Mel still left. So they fixed the route for everyone else: the Friday email now has a direct submission link, a name and a reply time. (You’ll see that fix put to the test in the Closing.)

The payment wasn’t saved. But the lesson was! That’s why you can’t judge a goodbye only on whether the member stayed. Call Mel a “failed save”, and the next member who misses a Thursday walks straight into the same hole.

My rule: **if you let someone down, fix it whether they stay or not.** Don’t make the fix depend on another payment. And celebrate your team for a great response

and a real fix, not just for saved payments. Otherwise people learn to hide awkward feedback.

LEAVE A DOOR, NOT A CAMPAIGN

A good goodbye doesn't need a "come back" offer. Thank them, celebrate their progress if you honestly can, and make the practical ending clear.

If they might like to return one day, ask if they'd like to hear from you. And only get in touch when you have a real reason:

> **EXAMPLE WORDING**
>
> We now run the lunchtime clinic you asked about. You said you'd like to know if that changed, so here are the details in case it's still useful.

That's it. A string of "We miss you!" emails makes a business sound more interested in its empty chair than in the person who used to sit in it.

When You Do Have Something New

None of this means you can never invite people back. It means you need a real reason.

Here's how to do it well:

- **Keep an alumni list, with permission.** When someone leaves, ask if they'd like to hear about future programs. The people who say yes are your warmest audience.
- **Invite them when something has genuinely changed.** A new time slot they asked for. A new program for where they are now. A new intake opening.

- **Say what's different.** "We've fixed the thing you told us about" is the most powerful re-enrollment email you'll ever send, as long as it's true.
- **Welcome them back as returning members.** Don't send them through beginner onboarding again. Start with a short Renewal Runway: what's changed since they left, and what they'd like help with now.

AT SCALE

with Marcus · Systems That Scale

Marcus's members can cancel with one button, and the confirmation arrives straight away. No person needed. But a person reads every reason. An AI assistant does the first Exit Sort pass on the month's departures, and the client success lead checks every label. One number goes in front of the team each month: how many departures were Delivery, the ones they could have prevented. It's the number Marcus most wants to see fall, and he celebrates the team when it does.

YOUR ACTION STEPS

1 **Try to leave your own membership**

Go through your cancellation process as a member would. Is it as easy as joining?

2 **Rewrite your cancellation reply**

Confirm first, then ask one optional question (or none).

3 **Sort your last five departures**

Use the five Exit Sort categories, with their words next to your labels.

4 **Book a monthly departure review**

Look at the month's goodbyes together and ask, "What keeps coming up?" Put it in your calendar now!

5 **Fix one thing**

Pick one recurring issue and give it an owner, a date and a way to check it worked. This is the step most businesses skip. They collect great feedback, discuss it… and change nothing.

QUICK RECAP

- ✓ Make leaving as easy as joining.
- ✓ Confirm first, ask second. Never hold a cancellation hostage.
- ✓ The Exit Sort: Delivery, Fit, Circumstances, Completion and Unknown.
- ✓ If you let someone down, fix it whether they stay or not.
- ✓ Only get back in touch when you have a real reason.

You can’t build a membership nobody ever leaves. But you can build one that learns every time someone does. And now you’ve got plenty to work on! The last step is choosing where to begin.

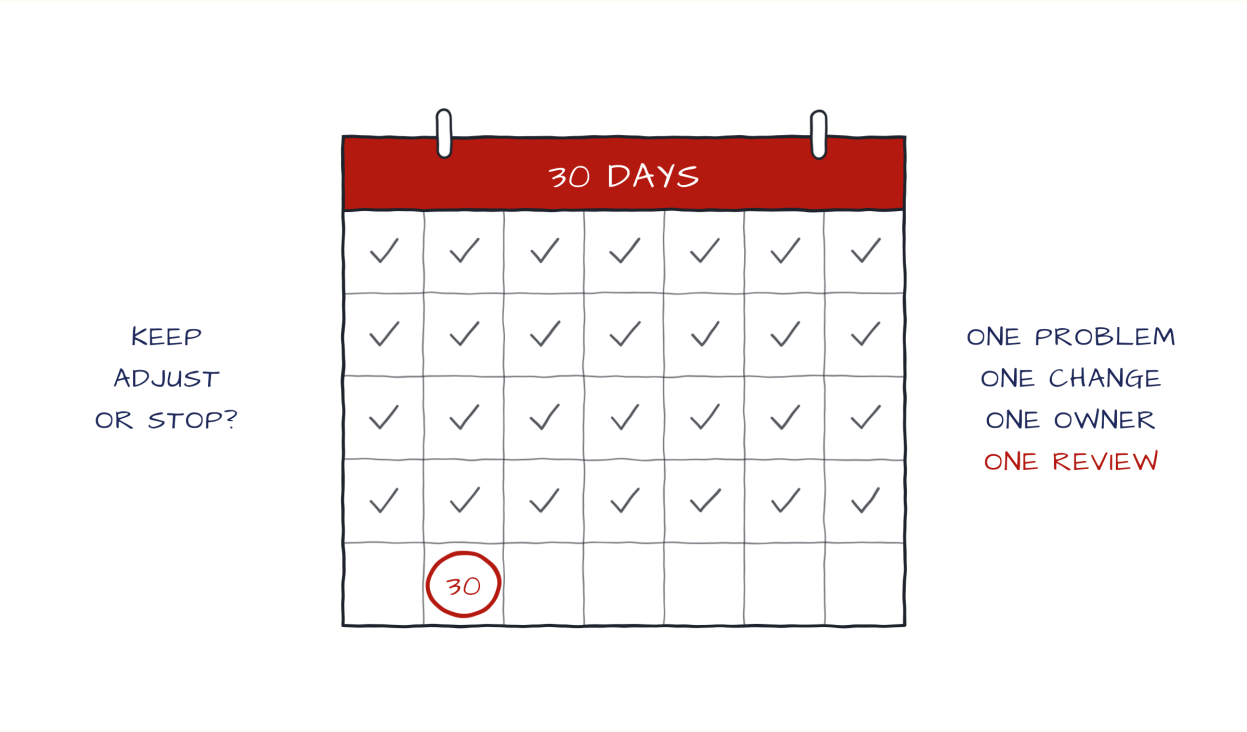
THE 30-DAY FIX

THE BIG IDEA

You don't need a retention strategy to get started. You need one problem, one change and 30 days.

IN THIS CHAPTER, YOU'LL LEARN

- Where I'd start if I were building my first membership again
- The 30-Day Retention Test: a week-by-week plan to fix one thing
- How to decide whether your fix is worth keeping
- How to make retention part of how you run your business



You made it! Thank you for sticking with me.

Now, I know the temptation. You want to do *all* of it. Redesign onboarding. Build a dashboard. Train the team. Rewrite the renewal emails. By next month, you'll have a very impressive project list… and the same member is still waiting for an answer.

So don't. Choose one problem you recognized while reading this book, and stay with it long enough to change what a member experiences. That might sound small. But it's where every retention strategy that works begins.

WHERE I'D START

If I started my first membership again tomorrow, I'd fix what happens when a new member first asks for help.

That moment matters so much. Someone has paid, tried to move forward and hit the point where they need you. What happens next tells them a lot about the business they've joined.

So I'd choose one new member, read why they joined and follow their first question through the business. Who saw it? Who answered? Did the answer help them take the next step, or send them off searching somewhere else?

Then I'd ask the member. That part really matters. A friendly, accurate reply can look like a job well done, while the person receiving it still has no idea what to do on Tuesday afternoon.

For the first month, I'd make sure someone owned every new member's first request, all the way through to a useful answer. Wherever someone got stuck, I'd fix that part of the process. Then I'd follow the next person through.

It's a modest start. You could do it with a short list and a conversation. But imagine being that member. You ask a question about something that matters to you. Someone understands it, helps you act and checks you got somewhere. A month later, when the next payment comes out, you've got a real experience to remember.

LOOK AT WHAT YOU CAN CONTROL

Yes, the world is changing. AI is changing what people expect and what they can get for free. People are choosier about who they trust. Take all of that seriously!

But be honest about what's actually happening inside your business. AI didn't leave Jess's question unanswered for twelve days. The economy didn't keep sending Leah invitations to sessions about finding her first client. And a tough market doesn't stop you checking whether Thursday's link works.

Some problems belong to the world. Plenty belong to you. It's worth knowing which is which.

And remember the money. In Chapter 2, eight members who left in their first month created a $2,800 gap from one intake. No marketing campaign closes that gap. Keeping people does.

THE 30-DAY RETENTION TEST

The **30-Day Retention Test** turns one problem into a piece of work you can finish. The rule is simple:

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

You're not trying to transform the business in a month. You're finding out if one specific change helps members get what they came for.

WHEN	WHAT YOU DO	WHAT YOU'LL HAVE AT THE END
Week 1	Choose and understand one problem.	A clear group, the evidence and a starting point.
Week 2	Make one change, and test it.	A working change with a named owner.

WHEN	WHAT YOU DO	WHAT YOU'LL HAVE AT THE END
Week 3	Watch what happens.	Member feedback, results and what it costs you.
Week 4	Decide.	Keep, Adjust or Stop, plus the next step.

Week 1: Choose a Problem You Can See

Start with evidence you already have: support messages, questions people keep asking, recent departures or a broken route you've walked yourself.

Then write the problem as something you could observe. "Members are disengaged" is too vague. "Several new members asked where to send their first piece of work, and two said they gave up looking" gives you somewhere to start.

Before you change anything, decide what would make the change worth keeping. What result would you like to see? How much time and money are you willing to spend? Setting those limits now keeps you honest later, when you're tired, busy and rather attached to your own idea!

Week 2: Make One Change

Write one sentence about why you think it will help. "If new members get a direct link to submit their first piece of work, fewer will need to search or ask."

One change can include a few small edits. Fixing a route might mean updating the reminder, the calendar entry and the event page together. That's still one change. But launching a new onboarding course, a community challenge *and* a discount campaign in the same month? You'll never know what worked.

Give it one owner. If you work alone, put your own name on it and block out real time. And test it before members do. A clear instruction that leads to an inbox nobody checks hasn't solved anything. It's just moved the problem!

Week 3: Watch What Happens

Look at what members do. Do they get where they're meant to go? Can they finish the task? Ask about their experience, not your idea: "Were you able to send your work?" tells you far more than "Do you love our new support page?"

Watch your team too. Fewer repeated questions? Or has the work just moved to someone else? Can you keep this up?

And write down anything that *doesn't* fit what you hoped. If three people succeed and one still gets stuck, that fourth person is your most valuable evidence.

Week 4: Decide

Compare what you expected with what actually happened. Then make one of three decisions:

Keep. It works and you can sustain it. Make it part of normal delivery, and name who looks after it.

Adjust. The idea works, but something still needs fixing. Name the next fix and set another review date.

Stop. It didn't help enough, or it cost more than it gave. That's not giving up on retention. It's making room for something that works!

MEL'S MONTH

Let's finish with Mel, the electrician we met back in Chapter 1. After she left, the membership added a direct feedback link to the Friday email. Now they want to know if new members have the same problem in their first week.

What they find is a maze. The welcome email links to the resource library. Inside the library, a long orientation video explains that feedback requests go on a separate page. Last month, 6 of the 20 new members had to ask for directions.

So here's their test:

- **Problem:** New members can't easily find the feedback route they paid for.
- **Owner:** The support lead.
- **The bar:** The next five new members they watch should submit without help, setup should take less than two hours, and admin should add less than fifteen minutes a week.
- **The change:** A direct submission link and a two-line explanation in the welcome email and on the member home page.

Over the next month, 22 people join. Only 2 ask for directions. Four of the five members they watch submit without help. The fifth finds the page but can't tell which file types it accepts.

The decision? **Adjust.** They'll clarify the file types and watch the next five members before making it standard. And they put a date in the calendar to check the Cohort Staircase when this group reaches the same age as the last one.

Nobody's announcing a huge retention breakthrough. But a benefit members paid for is now easier to reach, one remaining problem has been found, and there's a clear next step. That's real retention work!

Your 30-Day Retention Test

The member group and the specific problem

What we know, and what we don't know yet

The one change, and why we think it will help

Owner / start date / review date

What we'll watch, and where we'll record it

What result would make it worth keeping, and at what cost?

At review: what happened, including anything that didn't go to plan

---

Decision: Keep / Adjust / Stop. Why?

Next action, owner and date

YOUR FIRST 90 DAYS

One test is a great start. Here's how the first three months can build on each other:

MONTH	WHAT YOU DO
Month 1	**Diagnose.** Rewind your last five cancellations (Chapter 1), build one Cohort Staircase (Chapter 2) and work out your churn rate and average stay. Circle the biggest drop.
Month 2	**Test.** Run your first 30-Day Retention Test on the problem at that drop, using the chapter that matches the member's question. Start your monthly scorecard.
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.

After that, it's one test a month and one scorecard review a month. That's it. It's not glamorous, but it works.

MAKE RETENTION PART OF HOW YOU RUN THE BUSINESS

A great fix fades if nobody builds it into everyday operations. So update the real template, instruction or job description. Tell the people who use it. And delete the old version, so your improvement doesn't become one more document to keep track of.

Then give retention a regular spot in your business meetings. Ask four questions:

- What are members struggling to get?
- What has changed in what they need?
- What did this month's departures teach us?
- Did the improvements we promised actually happen?

Your Monthly Retention Scorecard

Bring six numbers to that meeting. Every one of them comes from a tool you've already learned:

NUMBER	WHAT IT TELLS YOU	WHERE IT COMES FROM
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)

You don’t need special software. A simple spreadsheet works. And with small numbers, remember the rule from Chapter 2: read the names, not the percentages.

Leave every meeting with one clear decision and one owner. When things get busy, this is always the first work to get pushed aside, because the next sale feels more urgent. Protect it!

THE PROMISE AFTER THIS PAGE

At the very beginning, I asked you a question. If I joined your membership and stayed six months, who could tell me what had changed for me because I stayed?

Here’s what that answer can sound like.

Sophie joined at her kitchen table with a twelve-page proposal and a fee she was nervous about. In her first week, she fixed the paragraph that was about to cost her two days of free work. She found Leah, who reads her drafts and asks the awkward questions about deadlines. When she went quiet, someone noticed she was doing well instead of assuming she’d drifted off. At three months, her Progress Receipt said her proposals took two hours instead of a day, and she’d stopped apologizing for her price. At six months, she’s working on the thing she finds hardest, following up with prospects who go silent, and she knows exactly which Thursday to bring it to.

Anyone on your team could tell Sophie that story, because it’s all in one record. That’s what all these tools add up to. It’s not really a system. It’s a relationship, written down so anyone on your team can pick it up.

So think about that one person who joined your membership in the last month. In the Introduction, I asked you to finish this sentence: *By the time their next payment comes out, I'd love them to have _____.*

Do you know the answer now? Do they?

Choose your problem. Name the owner. Set the review date. And then follow through, even when the next marketing campaign looks more exciting.

I'm so glad we got to do this together. To your membership's success!

Clint

You can't decide whether a member stays. But you can decide whether your business keeps its promise.

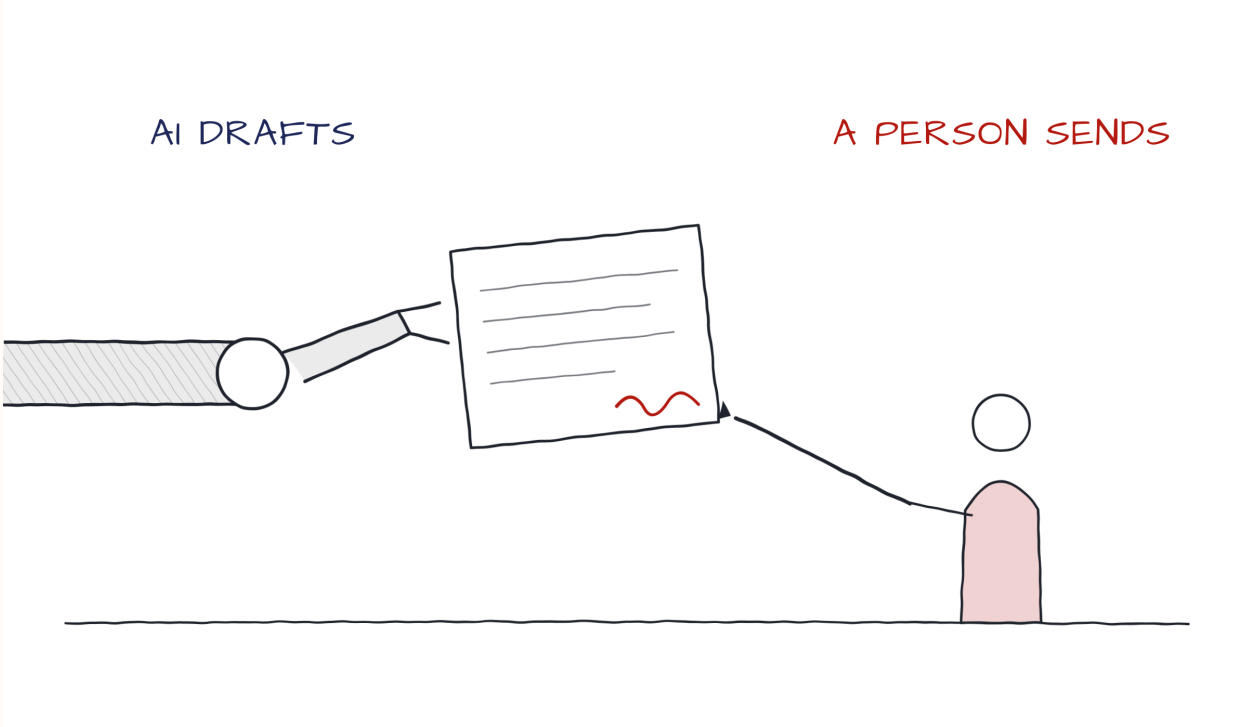
PUTTING AI TO WORK (WITHOUT GOING ROBOT)

THE BIG IDEA

AI can save you hours on the admin behind every tool in this book. It can't care about your members. Use it to notice, sort and draft, and keep the human parts human.

IN THIS CHAPTER, YOU'LL LEARN

- Which parts of the book AI can genuinely help with
- Five simple prompts you can use this week
- The rules that stop AI making your membership feel cold
- How to avoid getting bogged down in tools and automations



FIRST, A WARNING

I love what AI can do. But let me say this as clearly as I can.

You're working with humans, in a human community. Don't go all robot on them!

Your members can get information anywhere. They can ask an AI for a pricing template at two in the morning, for free. What they *can't* get anywhere else is you, your team and this incredible community you've built: someone who remembers what they're working on, notices when they've gone quiet and genuinely cares how their Friday went.

As more businesses hand their member experience over to automation, the human touch becomes *more* valuable, not less. A personal message from a real person is about to become one of the most powerful retention tools you have. So don't automate it away!

And please don't get bogged down in the AI systems of it all. I've watched founders spend a whole month building the "perfect" automated retention machine while their members waited for a simple reply. If you're spending more time setting up tools than talking to members, stop. Pick one task, save some time, and spend that time on people.

WHERE AI CAN HELP

Here's how an AI assistant, like ChatGPT or Claude, can support each part of the book, and what should always stay with a person.

TOOL	AI CAN HELP YOU...	KEEP HUMAN
Cancellation Rewind (Ch 1)	Pull their goal, dates and exact words out of a messy email thread.	Asking the question, and reading the answer.
Promise Playback (Ch 3)	Compare your sales page and welcome email, and flag where they don't match.	Deciding what you'll actually deliver.
First Win Plan (Ch 4)	Draft a personal welcome email from a member's welcome form.	Checking it sounds like you, then sending it.
Teach, Apply, Finish (Ch 6)	Add up how much time next month's calendar really asks of members.	Choosing what comes off the calendar.
Touchpoint Tally (Ch 7)	Turn your notes from walking a route into a tidy fix list.	Walking the route yourself, on your phone.
Quiet Member Matrix (Ch 8)	Draft check-ins that use each member's goal and last update.	Deciding who gets one, and pressing send.

TOOL	AI CAN HELP YOU...	KEEP HUMAN
Progress Receipt (Ch 9)	Draft a receipt from your member notes.	The conversation, and the member's own words.
Exit Sort (Ch 11)	Sort a month of cancellation emails into the five categories.	Checking every label, and fixing one thing.

See the pattern? AI does the sorting and the first draft. A person does the noticing, the deciding and the caring.

And if you have hundreds of members, this is where AI really earns its keep. Sorting 500 cancellation messages into the Exit Sort categories could take a person two full days. An AI assistant can do a first pass in minutes. Your team still checks every label, but now they spend their time fixing what they find, not sorting.

FIVE PROMPTS TO TRY THIS WEEK

Copy these into your AI assistant. Remove names and personal details first (more on that below).

1. For the Cancellation Rewind:

> PROMPT
>
> Here's a member's welcome form and their cancellation email. List their original goal in their own words, the exact words they used when they left, and any dates mentioned. Don't guess at reasons. Mark anything you're unsure about with a question mark.

2. For the Promise Playback:

PROMPT

Here's my sales page and my welcome email. List every promise the sales page makes, and tell me whether the welcome email explains how a new member actually gets each one. Flag anything a buyer might picture differently from what we deliver.

3. For a check-in:

PROMPT

Write a short, warm check-in message (under 60 words) to a member who joined to [goal]. The last thing we know is [latest update]. Ask what happened, and offer one useful next step. Make it sound like a real person, not a marketing email. No exclamation marks in the first line.

4. For a Progress Receipt:

PROMPT

Using these notes, draft a Progress Receipt with four parts: Start, Shift, Significance and Support. Use only facts from the notes. Leave Significance blank for the member to fill in, and end with: "Have I got this right?"

5. For the Exit Sort:

PROMPT

Here are last month's cancellation messages. Sort each one into Delivery, Fit, Circumstances, Completion or Unknown. Keep each member's exact words next to your label. If more than one category fits, say so. Then tell me which issue comes up most often.

THE RULES

Every tool in this book has a human rule built into it. Keep them when you add AI.

1 **AI drafts. A person sends**

Read every message before it goes out. Change anything that doesn't sound like you. If you wouldn't say it face to face, don't send it.

2 **Keep facts and guesses apart**

AI is very good at sounding sure about things it's made up. If it says a member "seems frustrated", check what they actually said.

3 **Protect your members' privacy**

Don't paste names, emails, payment details or private stories into an AI tool unless you've checked your privacy policy and the tool's settings. Swapping names for "Member A" takes ten seconds.

4 **Never use AI to make leaving harder**

No chatbots standing between a member and the cancel button. Confirm first, ask second, every single time.

5 **Don't fake the personal touch**

An automated message pretending to be a personal one is worse than an honest automated one. If a person didn't write it or read it, don't sign it like they did.

6 **One task at a time**

Start with the job that eats the most of your week. Get that working. Then decide if you need anything else.

YOUR ACTION STEPS

1 **Pick one time-consuming task**
from the table above.

2 **Try the matching prompt**
on real (anonymized) information.

3 **Check every word**
of what it gives you against what you actually know.

4 **Spend the time you saved on people**
Use it to send one personal message or have one real conversation with a member.

QUICK RECAP

- ✓ Use AI to notice, sort and draft. Keep the noticing, deciding and caring human.
- ✓ The human touch is becoming *more* valuable, not less.
- ✓ AI drafts, a person sends. Every time.
- ✓ Protect member privacy, and never use AI to make leaving harder.
- ✓ Don't get bogged down in systems. Save time, then spend it on people.

Your members didn't join to be managed by a machine. They joined because they trusted *you*, your team and your community. Use AI to give you more time to show up for them.

ONE SMALL FAVOR

DID THIS HELP?

If this book helped you keep even one member, I'd love to hear about it. Email me at **hello@clintsalter.com** and tell me what you changed. I read every one.

And if you know a membership owner, coach or community founder who's quietly losing members, pass this book on. It might be the most useful thing anyone sends them this week, and it helps me reach more of the people it was written for.

Thank you!

Clint

YOUR RETENTION TOOLKIT

YOUR MEMBER RECORD ON ONE PAGE

Every tool in this book adds a line or two to the same record. Here it is, all in one place! Keep it wherever your team already keeps member notes, like a spreadsheet, your membership platform or a CRM, and make sure everyone who talks to members can see it. Two simple rules: keep what the member said separate from what your team assumed, and date every entry.

FIELD	WHAT GOES HERE
Original goal	Why they joined, in their own words. (Chapters 1 and 4)
Joined and intake	Start date and the group they joined with, for the Cohort Staircase. (Chapter 2)
What they expected	The promise as they understood it when they paid. (Chapter 3)
First win	What they agreed to finish, the date, and what happened. (Chapter 4)
Second name	Who else here they'd ask for help, and any introduction made. (Chapter 5)
Current focus	Their destination, this month's focus and this week's next step. (Chapter 6)
Open issues	Anything broken or unanswered that we owe them, with owner and date. (Chapter 7)
Matrix position	Learn, Clarify, Respect, or Reconnect, as of the review date. (Chapter 8)

FIELD	WHAT GOES HERE
Latest Progress Receipt	Start, Shift, Significance, and Support, confirmed by the member. (Chapter 9)
Renewal Runway	Progress, Priority, Fit, Plan, and the membership decision. (Chapter 10)
Contact preferences	How and how often they'd like to hear from us.
If they leave	Their words, Exit Sort categories, remedy owed, and future contact preference. (Chapter 11)
Next action	What happens next, who owns it, and by when.

THE FOUR QUESTIONS

Every paying member is quietly asking four questions, in this order:

- **Is this what I bought?** (Attention)
- **Do I belong here?** (Connection)
- **Is it working?** (Execution)
- **Is it still worth it?** (Extension)

The diagnostic tools tell you which question is going unanswered. The rest help you answer it.

THE TOOLS AT A GLANCE

TOOL	THE QUESTION IT ANSWERS	USE IT WHEN
Cancellation Rewind (Ch 1)	When did they really decide, and why?	Someone has just left and you're not sure what happened.
Cohort Staircase (Ch 2)	When are members leaving?	You want to know which month to fix first.
Promise Playback (Ch 3)	Is this what I bought?	New members seem surprised or disappointed early.
First Win Plan (Ch 4)	Can they get something useful done in week one?	Members stall before they've really started.
Second Name Test (Ch 5)	Do they know anyone here besides us?	Members like you but haven't found their people.
Teach, Apply, Finish (Ch 6)	Can they do the work, not just learn about it?	The calendar is full and members feel behind.
Touchpoint Tally (Ch 7)	Who does the extra work when delivery goes wrong?	Members miss sessions, can't find things, or ask the same question.
Quiet Member Matrix (Ch 8)	What does their silence actually mean?	You're about to send everyone a "We miss you!" email.
Progress Receipt (Ch 9)	Can they see what's changed?	Members say "I haven't used it enough."
Renewal Runway (Ch 10)	Is it still worth it, and what for?	A member has reached their goal or a renewal is coming up.

TOOL	THE QUESTION IT ANSWERS	USE IT WHEN
Exit Sort (Ch 11)	What should we do about this departure?	You have cancellations to review.
30-Day Retention Test (Closing)	Did our change help?	You've chosen one problem to fix this month.

Every chapter ends with Your Action Steps. The full worksheets are in the companion workbook, ready to print and fill in.

GLOSSARY

TERM	WHAT IT MEANS
Average stay	Roughly how long a typical member stays. Work it out as 1 ÷ your monthly churn rate. (Chapter 2)
Churn	Members leaving. Your monthly churn rate is the members who left this month ÷ the members you had at the start of the month. (Chapter 2)
Cohort	A group of members who started at the same time, like everyone who joined in January. (Chapter 2)
First win	The first useful result a new member gets with your help, ideally in their first week. (Chapter 4)
Lifetime value	What an average member leaves you over their whole stay, minus what it cost to bring them in. (Chapter 2)
Member record	One place where everyone on your team can see a member's goal, progress and next action. (Chapter 8)
Renewal rate	Of the members due to renew, the share who did. (Chapter 10)

TERM	WHAT IT MEANS
Retention	Members staying. The opposite of churn.
Route	The series of touchpoints a member follows to get one job done, like joining a session. (Chapter 7)
Second name	Someone in your membership, besides you or their coach, a member would feel comfortable asking for help. (Chapter 5)
Touchpoint	Any moment a member meets your business: an email, a payment, a session or a support reply. (Chapter 7)

ACKNOWLEDGMENTS

THANK YOU

In 2013, I was lucky enough to work with the incredible Matt Church from Thought Leaders. At the time, I was consulting to business owners on everything from finding customers to keeping them. Matt walked me through a process to get clear on my superpower. When we looked back over my businesses and roles, the answer was obvious: I'm really good at keeping customers, because I've always put them at the center of everything I do.

Matt came up with a name for it: CareFactor. It was going to be my book and my keynote. But around the same time, I narrowed my consulting to dance studio owners, because that was my background, and CareFactor took a back seat while I grew what became Dance Studio Owners Association.

Later, I was lucky enough to work with the legendary keynote speaker Michael McQueen to develop the idea further. It grew into a book idea called *Get Over Your Selfie: The Power of Giving in an Age of Taking*, and a keynote to go with it. But DSOA kept soaring, so I put it on the shelf until I could give it my full attention.

Which brings me to 2026. More than ten years on, that work has become *Why Members Leave*. It's a very different book than it would have been back then. It now carries decades of building businesses, including three membership companies, all built around keeping customers. And my advisory work over the past two years showed me just how much this matters for people who run memberships and teach others for a living.

So, a big thank you to Matt and Michael for helping me shape this idea in the early years. And thank you to every customer who's been part of my businesses. You taught me how much it matters to deliver on my promise, and to keep delivering.

ABOUT THE AUTHOR

CLINT SALTER

Clint Salter is an award-winning entrepreneur, best-selling author and speaker who has spent more than 20 years building businesses that people stay with. He has founded and sold five companies, from a dance studio he opened at sixteen in a local community hall to Dance Studio Owners Association (DSOA), the world's largest membership platform for dance studio owners.

DSOA grew into a network of more than 50,000 studios, supporting over one million students every week, with more than 750 owners in its high-ticket program alone. Clint sold it to private equity in 2022 and stepped down as CEO at the end of 2024.

Keeping members has been at the heart of every business he's built. Today, he advises membership owners, community founders and coaches on exactly that, and RetentionCode is the system he built from that work. He's also the author of the best-selling *Dance Studio Transformation*.

His work has earned him the Gold Award for Entrepreneur of the Year at the 2021 American Business Awards. In 2020, he received awards including Bronze for International Entrepreneur of the Year, along with honors from the Asia-Pacific Stevie Awards and the American Business Awards for innovation and online training.

A sought-after keynote speaker, Clint has spoken at events including Impact, Blackbelt Intensive, Tribe Live and The Nitro Event. He's been a guest on podcasts such as *Business Lunch* with Roland Frasier and the *Influential Personal Brand Podcast* with Rory Vaden, and his thinking has been featured on NBC, Fox and ABC, and in the *Huffington Post* and the *Sydney Morning Herald*.

To have Clint speak to your group or team, or join you on your podcast, email **hello@clintsalter.com**.