



Client Retention Plan Worksheet

Turning Leads into Loyal Clients

Step 1: Understand Your Clients

1. What are the key reasons clients return to your spa?
(Examples: relaxing atmosphere, expert staff, special offers)

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- _____

2. What services are most popular with repeat clients?

- _____

3. What feedback have clients shared about their experience?

- _____
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Step 2: Create a Loyalty Program

1. Define your incentive:
(Examples: Free service after 5 visits, discount after \$200 spent)

- _____

2. How will you track loyalty points?
(Examples: Digital app, punch card, booking system)

- _____

3. How will you promote the loyalty program to your clients?

- _____
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Step 3: Design a Referral Program

1. What reward will clients receive for referrals?

(Examples: \$10 off their next visit, free product, exclusive perks)

○ _____

2. How will clients refer others?

(Examples: Shareable link, referral code, in-spa form)

○ _____

3. How will you communicate the program to clients?

(Examples: Email newsletter, social media, at the spa)

○ _____

Step 4: Plan Your Email Marketing

1. What type of emails will you send to retain clients?

(Examples: Monthly newsletters, seasonal promotions, appointment reminders)

○ _____

2. How often will you email your clients?

○ _____

3. What value will your emails offer to clients?

(Examples: Wellness tips, exclusive discounts, educational content)

○ _____

Step 5: Track and Adjust

1. How will you measure success?

(Examples: Increased bookings, positive feedback, referral growth)

○ _____

2. What changes can you make if results don't meet expectations?

○ _____

Take Action:

Use this worksheet to craft your retention plan, and don't forget to schedule your free consultation with Waterford Media for expert advice tailored to your spa.