

APPOINTMENT SCHEDULING

Client Retention Playbook

A stage-by-stage system, with scripts and a 90-day tracker, to turn one-time bookings into loyal clients worth \$1,400+ each in lifetime value.

- ✓ Print-optimized
- ✓ Expert-curated
- ✓ Actionable tips

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The Economics of Retention

Metric	Industry Average	Top Performers
New client acquisition cost	\$50-200	Same
Cost to retain existing client	\$5-20	Same
Retention rate	20-30%	60-80%
Revenue from repeat clients	40%	80%
Referrals from loyal clients	10%	40%

A 5% increase in retention = 25-95% increase in profit.

The Retention Framework

The 5 Stages of Client Loyalty

Stage 1: First Visit → Make it memorable

Stage 2: Second Visit → Confirm their choice

Stage 3: Regular Client → Build the relationship

Stage 4: Loyal Client → They prefer you

Stage 5: Advocate → They refer others

Your job: Move every client through these stages.

Stage 1: First Visit Excellence

Before They Arrive

24-48 Hours Before:

- Send confirmation with what to expect

- Include parking/entry instructions
- Attach any intake forms
- Share staff bio/photo

Template:

```
Hi [Name]!

Looking forward to meeting you tomorrow at [Time].

Here's what to expect:
• Arrive 5 minutes early
• [Preparation instructions]
• Ask for [Staff Name]

Questions? Reply to this message or call [Phone].

See you soon!
[Business]
```

During the Visit

Wow Factors:

- ☐ Greet by name
- ☐ Offer water/beverage
- ☐ Explain process before starting
- ☐ Check in during service
- ☐ Ask about preferences for next time
- ☐ Take notes in their file

After the Visit (Same Day)

Immediate Follow-Up:

```
Hi [Name]!

It was great meeting you today! Quick question –
how are you feeling about [service result]?

If you have any questions, just reply to this message.

Talk soon,
[Staff Name]
```

Book the Next Appointment

The Golden Rule: Never let a client leave without their next appointment booked.

How to Ask:

- "When would you like to come back?"

- "Most clients come back in [X weeks] - does that work for you?"
- "I have great availability on [Day] - want me to save your spot?"

Incentive: "Book now and save 10% on your next visit" (if needed)

Stage 2: The Critical Second Visit

Why the Second Visit Matters Most

- First visit: They're curious
- Second visit: They're testing if you're consistent
- Third visit: They're becoming a regular

The second visit decides if they stay or go.

Second Visit Strategy

3-5 Days After First Visit:

```
Hi [Name]!  
  
Just checking in – how's [service result] holding up?  
  
When you're ready to book again, here's your link: [Link]  
  
(I recommend booking [X weeks] out to get your preferred time)  
  
[Staff Name]
```

If They Haven't Booked After 2 Weeks:

```
Hey [Name]!  
  
Haven't seen you in a bit – hope everything's going well!  
  
I've got some availability next week if you'd like to  
come back for [service]. Let me know what works!  
  
[Staff Name]
```

Make the Second Visit Even Better

- Reference notes from first visit
 - Remember their preferences
 - Note improvements since last time
 - Ask what they want differently (if anything)
-

Stage 3: Building Regulars

Optimal Rebooking Windows

Service Type	Ideal Interval	Reminder Timing
Hair salon	4-6 weeks	2 weeks before
Spa/massage	4-8 weeks	2 weeks before
Medical/dental	3-6 months	1 month before
Fitness/wellness	Weekly	3 days before
Consulting	Monthly	1 week before

Automated Rebooking Sequence

Week 1 (After appointment): "Thanks for coming in! Hope you're enjoying [result]."

Week [X-2] (2 weeks before ideal rebook): "Time flies! Ready to book your next [service]? [Link]"

Week [X] (Ideal rebook time): "Just a reminder - it's about time for your [service]. Want me to save you a spot?"

Week [X+2] (If they haven't booked): "Missed seeing you! Here's 10% off your next visit: [Link]"

Tracking Regular Clients

Green Zone (Healthy):

- Visits within expected interval
- Books ahead
- Responds to messages

Yellow Zone (At Risk):

- Slightly overdue
- Booking last minute
- Not opening messages

Red Zone (Churning):

- Significantly overdue
- Hasn't booked in 2+ cycles
- Unresponsive

Stage 4: Creating Loyal Clients

Loyalty Program Basics

Simple Structure:

Book 5 times → Free [Service/Discount]
Book 10 times → VIP status

VIP Benefits:

- Priority booking
- Flexible cancellation
- Exclusive services
- Early access to specials
- Birthday rewards

Personalization That Matters

Track in Client Notes:

- Preferences (products, pressure, temperature)
- Life updates (job, family, travel)
- Booking patterns (preferred days/times)
- Communication preference (text vs email)

Use This Information:

- "How was your trip to [destination]?"
- "I saved your usual time slot for you"
- "Tried a new [product] I think you'll love"

Surprise & Delight

Unexpected Touches:

- Handwritten thank you note after 5th visit
 - Small gift on their birthday
 - Upgrade without asking
 - Remember their anniversary with you
 - Send relevant content/tips between visits
-

Stage 5: Turning Clients Into Advocates

The Referral Request

When to Ask:

- Right after a great experience
- When they give you a compliment
- At a milestone (5th, 10th visit)
- When they mention friends/family who could benefit

How to Ask:

"I'm so glad you're happy with [result]!
The best compliment I can receive is a referral.
If you know anyone who might benefit, I'd love to help them too!"

Referral Program Structure

Keep It Simple:

Refer a friend → You both get \$20 off

Here's your personal referral link: [Link]
Or have them mention your name when booking.

Track Referrals:

- Who referred whom
- Thank the referrer
- Update both on the reward

Review Requests

When to Ask:

- 24-48 hours after visit
- After positive feedback
- After a compliment in person

Template:

Hi [Name]!

So glad you loved your [service] yesterday!

Would you mind taking 30 seconds to leave a review?
It really helps others find us.

[Google Review Link]

Thanks so much!
[Staff Name]

Winning Back Lost Clients

The Re-Engagement Sequence

30 Days Overdue:

Hey [Name]! Haven't seen you in a while.
Everything okay? We'd love to see you again soon.
Book here: [Link]

60 Days Overdue:

[Name], we miss you!

Here's 15% off your next visit – no strings attached.
Hope to see you soon: [Link]

Valid until [Date]

90 Days Overdue:

Hi [Name],

It's been a while! We wanted to check in and see if there's anything we could do better.

If you're open to it, I'd love to chat briefly. Either way, you're always welcome back.

[Staff Name]

Exit Survey (If Possible)

When clients leave, try to learn why:

- Moved away?
- Found somewhere closer?
- Unhappy with something?
- Price concerns?
- Schedule conflicts?

Use feedback to improve.

Communication Cadence

Don't Over-Communicate

Per Client Per Month:

- Appointment reminders: As needed
- Check-ins: 1-2 maximum
- Marketing: 1-2 maximum
- Offers: 1 maximum

Total: 4-6 touches per month maximum

Message Hierarchy

Priority	Type	Timing
1	Appointment confirmations	Immediately
2	Appointment reminders	24-48 hours before
3	Post-visit follow-up	Same day
4	Rebooking prompts	Based on service cycle

Priority	Type	Timing
5	Marketing/offers	Monthly at most

Metrics to Track

Essential Retention Metrics

Metric	How to Calculate	Target
Return rate	Clients who book again / Total new clients	60%+
Average visits	Total visits / Unique clients	3+ per year
Lifetime value	Average spend × Average visits × Years as client	Know yours
Churn rate	Clients lost / Total clients	Under 5%/month
Referral rate	New clients from referrals / Total new clients	20%+

Client Segments to Watch

Track separately:

- New clients (0-3 visits)
 - Developing (3-10 visits)
 - Regulars (10+ visits)
 - VIPs (top 20% by spend)
 - At-risk (overdue for rebooking)
 - Lost (no activity 90+ days)
-

Quick Implementation Plan

This Week

1. ☐ Set up post-visit follow-up message
2. ☐ Create rebooking reminder sequence
3. ☐ Start tracking return rates
4. ☐ Train on asking for next appointment

This Month

1. ☐ Build client segments
2. ☐ Create win-back sequence for lost clients
3. ☐ Implement simple loyalty program
4. ☐ Set up review request automation

This Quarter

1. ☐ Launch referral program
2. ☐ Add VIP tier with benefits
3. ☐ Create personalization system
4. ☐ Analyze and optimize based on data

Automate Retention with Triviyo

Triviyo makes retention effortless:

- Smart rebooking reminders
- Automated follow-up sequences
- Client segmentation
- Win-back campaigns
- Loyalty tracking

Turn one-time visitors into lifelong clients.

Start your free trial at triviyo.com

Retention is a system, not an accident. Build yours.

Calculate Your Client Lifetime Value (CLV)

You can't improve what you don't measure. Run your real numbers:

```
Average spend per visit ..... A = $_____  
Visits per year ..... B = _____  
Years a client stays ..... C = _____  
  
CLIENT LIFETIME VALUE = A x B x C = $_____
```

Worked example: \$80/visit × 6 visits/year × 3 years = **\$1,440 per client**. Now compare that to what you spend acquiring one (typically \$50-200). Every client you keep instead of replace is \$1,200+ of pure margin you didn't have to buy.

The leverage of small improvements

Lever	Move it from → to	Effect on CLV
Visits per year	4 → 6 (+50%)	+50% lifetime value
Years retained	2 → 3 (+1 year)	+50% lifetime value
Return rate	30% → 50%	Roughly doubles repeat revenue

A 5% lift in retention raises profit 25-95% (Bain & Co.). This is the highest-ROI work in the business — and it's almost entirely automation and follow-through, not discounts.

90-Day Retention Implementation Tracker

Phase	Action	Done	Target metric
Days 1-30	Turn on same-day post-visit follow-up	☐	80%+ delivered
	"Book next appointment before you leave" script	☐	40%+ rebook on the spot
	Start tracking return rate	☐	Baseline recorded
Days 31-60	Build client segments (new/regular/at-risk/lost)	☐	All clients tagged
	Launch win-back sequence (30/60/90-day)	☐	15%+ of lapsed reactivated
	Automate review requests (24-48h post-visit)	☐	10%+ leave a review
Days 61-90	Launch referral program (\$20/\$20)	☐	20%+ of new clients referred
	Add VIP tier for top 20% by spend	☐	VIP retention 80%+
	Review CLV vs Day 1 baseline	☐	Measurable lift

Common Retention Killers (and the Fix)

- **No rebooking ask at checkout** → Script it. "Most clients come back in [X weeks] — want me to save your spot?"
- **No follow-up after the first visit** → The second visit decides if they stay. Automate a same-day and a 3-5 day touch.
- **No segmentation** → You can't win back people you can't see. Tag at-risk clients the moment they go overdue.
- **Over-communicating** → Cap total touches at 4-6/month or you train people to ignore you.
- **No personalization** → Notes in the client file ("prefers afternoons, allergic to X, mentioned a trip to Italy") turn transactions into relationships.

Triviyo automates the entire retention engine — post-visit follow-ups, rebooking reminders by service cycle, client segments, win-back campaigns, and referral tracking — so this playbook runs itself.

Version 1.0 | triviyo.com

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