Staff Strategies Retention Report Guide

The Staff Strategies Retention report lists new customers that purchased a service on their first visit in the date range. For each customer, their first visit is displayed and if they have returned, their last visit is displayed. A "smiley" face is displayed in the 'To Stylist', 'To Salon' or 'To the Brand' column if the customer has returned for a second service visit by the retention date entered by the user. A "frown" face is displayed in the 'Lost' column if the customer did not return to either staff or salon by the specified date. This report is grouped together by each staff member and customers are listed under the staff member who preformed a service for them.

When to create the report
We recommend reviewing this report on a monthly basis. It is typical to run this report on a 90 to 120 day range to ensure that the client has enough time to return after their first service visit.

How to create the report
1. From the SalonBiz/SpaBiz menu bar, click on the Report icon.
2. Double click on Staff Strategies Summary from the report side navigation. You will find it under the Strategies category.
3. Enter the beginning date and ending date for the new customer.
4. Enter the date of when the customers should have returned back to the location (Retention Date)
5. Select the staff member

What it tells you
The report is separated into several areas:
*   Customer- The name of the customer
*   First Visit- The customer's first service visit
*   Last Visit- The customer's last service visit before the Retention Date
*   To Stylist- Indicates that the customer returned to the staff member who preformed their first service at any time before the retention date. Does not have to be the last visit.
*   To Salon- Indicates that the customer returned to the salon, but not to the staff member who preformed their first service at any time before the retention date.
*   To Brand (Enterprise Only) - Indicated that the customer returned to one of the locations at any time before the retention date, but not to the location where their first visit was preformed.
*   Lost- Indicated that the customer did not return to the location

Totals at end of Report

- Total New Customers- the total number of new service customers
- Total to Stylist customers- total number of new service customers who returned to their first stylist
- Total to Salon Customers- total number of new service customers who returned to the salon, but not the same staff member as their first visit
- Total to Brand- total number of new service customers who returned to one of the locations other than the one where their first service was preformed
- Total Lost Customers- total number of new service customers who did not return by the retention date
- First Visit Retention Customers- The total number of new customers who were retained by the retention date
- First Visit Retention Percent- The percent of new customers who were retained before the retention date
- Lost Percent- The percent of new service customers who were not retained before the retention date.

Existing Customer Evaluation

- Existing Customers- The number of existing customers who had a service ticket during the new client date range
- Existing Customers Retained to Stylist- The number of existing customers who had a service ticket during the new client date range and returned for another service before the retention date and with the first staff they saw in the date range
- Existing Customers Retained to Salon- The number of existing customers who had a service ticket during the new client date range and returned for another service before the retention date in the first store, but without the first staff they saw in the date range
- Existing Customers Retained to Brand- The number of existing customers who had a service ticket during the new client date range and returned for another service before the retention date in a location other than the one of the first visit
- Existing Customers Lost- The number of existing customers who had a service ticket during the new client date range and did not return before the retention date
- Retained to Stylist Percent- The percent of existing customers who returned before the retention date to the same stylist
- Retained to Salon Percent- The percent of existing customers who returned before the retention date to the same location, but different stylist
- Retained to Brand Percent- The percent of existing customers who returned before the retention date to a different location
- Lost Percent- The percent of existing customers who did not return before the retention date

How it's used

This report is used to evaluate the retention of your new customers for a certain date range. The report will display by staff member any new clients the staff member preformed services on and if the client returned to the staff, salon or brand by the specified retention date.

STRATEGIES ™
THE PREMIER PUBLICATION FOR BUSINESS GROWTH

Staff Strategies Retention Details for
New clients from 9/1/2008 to 9/30/2008
Retained before 12/30/2008

Customer	First Visit	Last Visit	To Stylist	To Salon	To Brand	Lost
Becca Mobil: (504)	9/17/2008	10/4/2008		☺		
Sandra Mobil: (985)	9/9/2008					☒
Victoria Home: (985)	9/29/2008	11/28/2008	☺			
Totals	3 New		1	1	0	1
Percentages			33.33%	33.33%	0.00%	33.33%

First Visit Retention 2 66.67%

Total Lost Customers 1 33.33%

Existing Customer Evaluation

Existing Customers	79			
Retained to Stylist:	53	Retained to Salon:	12	
Retained to Stylist %:	67.09%	Retained to Salon %:	15.19%	
Retained to Brand:	2	Lost:	12	
Retained to Brand %:	2.53%	Lost %:	15.19%	