



## Why People Quit

### Step 3: Always Have a Pre-Call Plan & Script

Now that you're committed to never processing a cancellation without a conversation, and you're committed to finding out that every member matters, and why they matter to your membership, and why your membership matters to them, now I want you to be committed to this next step. To always have a pre-call plan and a script. Now, don't get ahead of me on this. I'm already going to have a checklist for you and script that I'm gonna combine everything into and have already done the work for you. But I do want to guide you through this process of having a pre-call plan and a script. I want you, in this pre-call plan, before you even talk to them there are certain steps that I want you to take. I don't want you to be caught off guard. I don't want you to sound like you don't know them. I don't want you to sound like you're not aware of who they are in your membership. At the same time, I want you to know some specific things so that you can build the personality and build a personal relationship into this conversation.

So one of the things that I want you to know is, and I know this sounds very basic, but I want you to know the name of the person who's canceling. I mean, after all, the very last thing you want to do is pull up somebody's email and find out that maybe they sent it from a different email address that was a different person's name, or maybe it was an office name, or a business name on the email. And you really don't have their full name. I want you to have their full name, so that you have it in front of them, and I want you to write it down on the checklist that I'm going to give you.

Then the next step is I want you to know their business name. Now, I'm assuming that this is maybe a B to B relationship that you have. A business to business relationship. If not, and it's a personal relationship, maybe it's a gym membership or something like that, I still want you to know a little bit about them. Maybe you don't need



to know their business name, but if this is more of a professional membership I want you to know their business name. I want you to also know their location. Now, this applies to everyone regardless of whether you're a business, or whether it's an individual membership. I want you to know their location. Where are they in the world? Where are they in your community? What area do they live in? Where does their business reside? So that you can know exactly where they're located.

Now, that's important for another reason, especially for those of you who have memberships that span across geographical regions, across the US, outside the US because this next step is important. Before you have a conversation with them I want you to ask when is the best time to call them. I mean, the last thing you want to do is if you're on the East Coast, and it's 9:00, and you're gonna follow-up with a cancellation request, is to call somebody at 6:00 in the morning in Pacific time. I mean, you don't want to do that. So I want you to know what is the best time to contact them. You're gonna be able to know that by just answering the question, "Where's their location?" So what is the best time to contact them?

Now, for those of you who have an individual membership where it's not necessarily a business membership, it's an individual membership. You might think through what is the best time to contact them. Is really the best time to contact them while they're at work? Maybe you should try to catch them on their lunch-break. You don't want to catch them in the middle of their workday when they're not going to be able to talk to you. So I want you to set aside when are the best times for us to process our cancellations depending upon where people are?

Now, the next question is a really good one that you really should know before you process the cancellation or give them a call. And that is how long have they been a member? How long have they been a member? Now, I'm hoping, I really am hoping, that those of you who've picked up this resource you have access to that



information. That you can, somehow or another, you have in your database or in your CRM, your Customer Relationship Manager, your software, you're going to be able to look at how long this person has been a member. That's important for a number of reasons. I mean, if they're brand-new to their membership that guides the conversation in a completely different direction. If they've been a member for an extremely long time that guides the conversation in another direction. Plus, with the other questions I'm going to have you answer in the pre-call plan, you'll also be able to put this together to see what the profile overall for this member is. You'll be able to know how long they've been with you, and what sort of activities they've gone through.

So, having said that, I want you to know what is the membership lifetime value? What is the membership lifetime value? Now, again, I hope you have immediate access to this information, but if not it's simple math. You take how long they've been with you, how many months they've been with you, and you multiply that by their monthly payment. So if they've been with you for 10 months, and it's \$10 a month that's very simple. Their lifetime value so far is \$100 in their membership. So I want you to know their lifetime value. Now, if there's other things that they've done with you, like they've bought products, I want you to know what products that they've bought. I want you to know what resources they've picked up from you, so that you'll be able to know how engaged they've been with your membership program.

I also want you to know what free resources they may have received from you. So maybe they picked up some other free resources off your website. Maybe they took advantage of the opportunity to take part in some free resources or services that you provide in your local store. So I want you to know what free items they've received from you as well. And then, I also want you to know what events they have attended. What events they have attended. Now, I recognize that not all membership business are doing events, but if you're doing webinars I would consider that an online event. So that would be an



event, or if you're doing an event locally in your store I'd want you to know that they came to certain events in your store. Or if they traveled to a conference, or a seminar to be apart of that I want you to know that as well because it says something about their engagement.

Going back to their total lifetime value I want you to be able to add-up, not just their membership rate that they've invested with you, but the amount that they've invested with you on products and resources. The amount that they've spent with you on event registrations. The amount of free resources that they've gotten from you, and you'll be able to calculate their total lifetime value. If you don't figure out, real quick, why this member matters to you just by calculating their total lifetime value, then, man, you've got bigger obstacles. I want you to be able to see their total lifetime value and be able to know exactly what they've done, and how they've interacted, not just with the membership, but also with your services, your products, and your resources, and your events in general.