

Client Retention

Watch the recording



Phorest
Client Retention



Understanding the 2 types of client retention

Overdue Clients:

Clients who have not returned during a specific time period (e.g not returned in the last 90 days (3 months))

Lost clients:

Clients who have not had a booking in the last 180 days (6 months)



Understanding your average return period

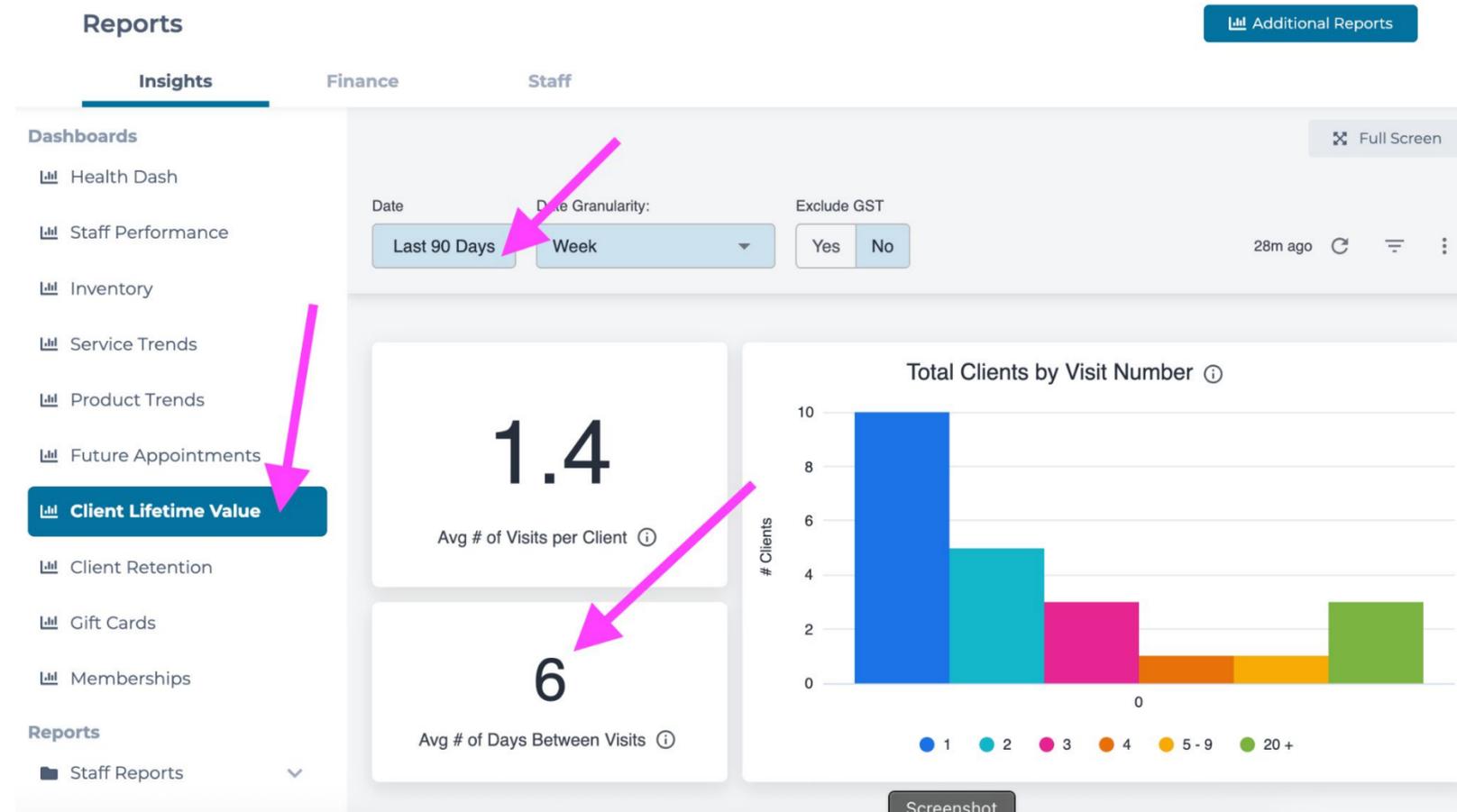
In Manager / Reports / Client Lifetime Value.

Set date range & refresh.

avg number of days between visits

This will show you the average number of days between visits for clients during this date range.

This is your overall average for that period





Overdue Clients

Understanding your average return period

Could the average client visits be more frequent?

Are you satisfied with this figure?

What is the potential value to your business of securing just one extra visit per client annually?

A useful way to estimate this potential revenue uplift is:
(average ticket price x number of active clients).

Tools to help you achieve this:

- Rebooking SMS
- Setting rebooking targets in staff goals
 - Client Reconnect program
 - SMS / Email Automation
 - Treatcard
 - Client Retention Report



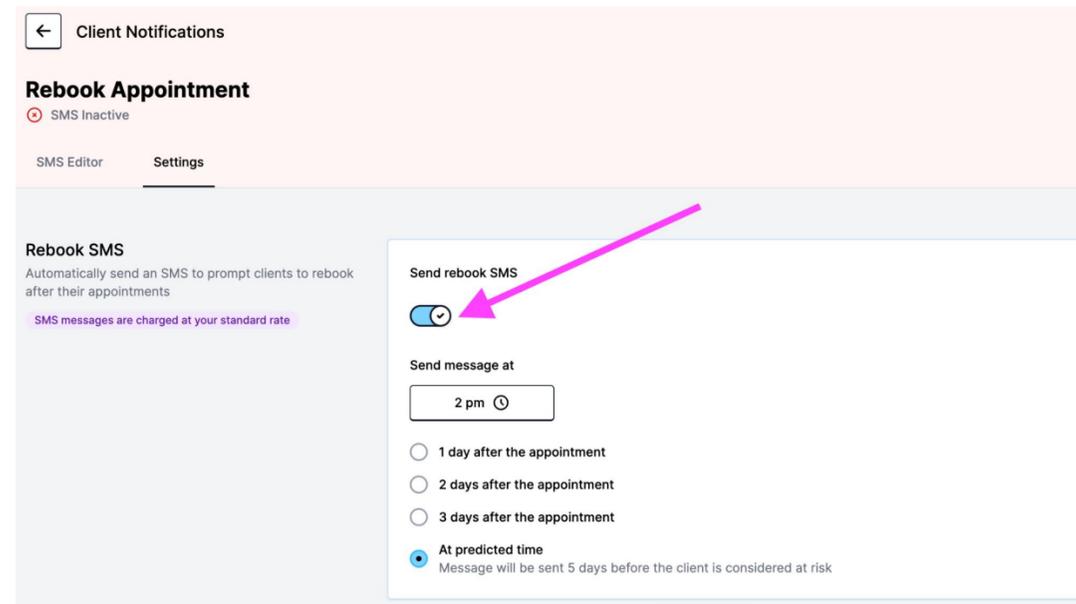
Rebooking SMS

The Rebook SMS allows you to schedule a gentle reminder for any clients who did not book their next appointment on the day of their last visit.

To enable the Rebook SMS, go to Manager > Client Notifications > Rebook Appointment

Help Sheet

[How can I automatically send a rebooking reminder SMS to my clients? – Phorest](#)





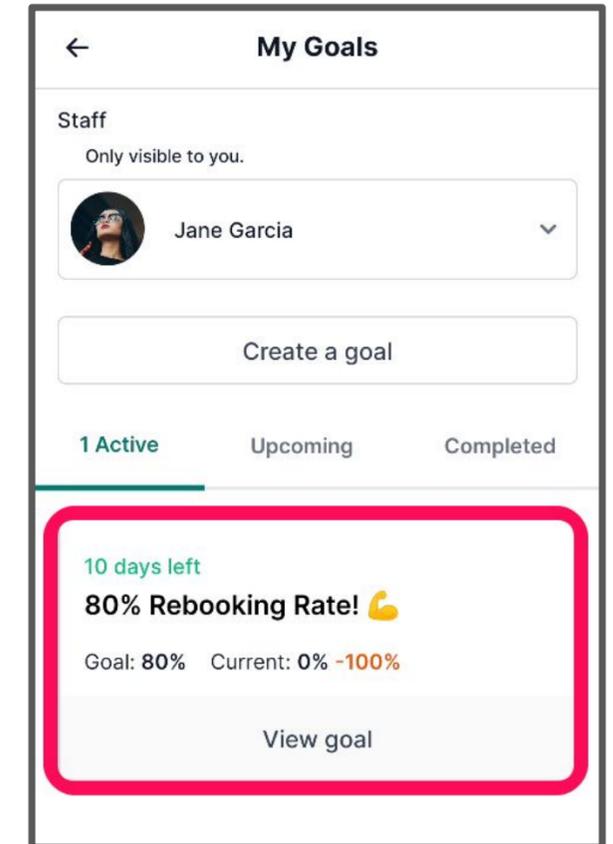
Rebooking Goals

Staff Goals: Rebooking

The easiest way to try and ensure your clients return during the expected date range is to ensure rebooking during the checkout process, Target your team on this to ensure everyone plays their part in ensuring the client returns.

Help sheet

[How can I set up Goals for my staff in PhorestGo? – Phorest](#)

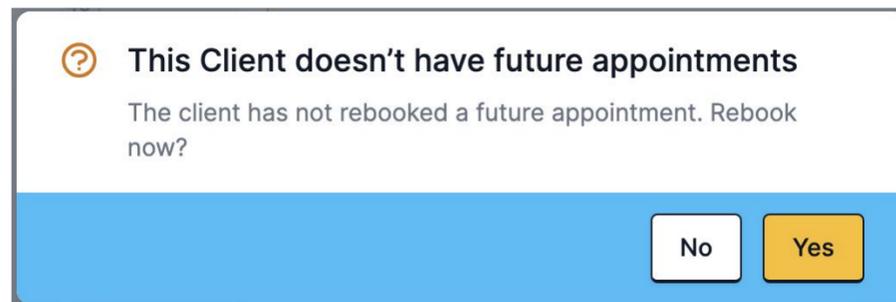


How to toggle rebooking prompt before checkout

Great if your staff are missing the rebook at the cash out screen

Help sheet

[How do I enable a rebooking prompt? – Phorest](#)





Client Reconnect

Client reconnect needs clients to have had a minimum of 3 appointments before it can work,
It looks at each category individually ([some categories are excluded found here](#))

SMS for client reconnect are free in our complete advantage and complete advantage plus packages

Client Reconnect helps you identify clients who may be at risk of not returning to your business.

A client is marked as at risk/overdue when they go beyond their typical booking interval. This interval is automatically calculated by Phorest after the client has had three appointments within the same Service Category.

Their typical booking interval is the average time between those three visits.

Example:

Client A typically books every 4 weeks → considered overdue 4 weeks after their last visit.

Client B typically books every 6 weeks → considered overdue 6 weeks after their last visit.

Phorest automatically determines each client's booking pattern based on their actual visit history, so there's no need to set or adjust default times.

The system will prompt you to reconnect once a client falls outside their usual pattern.

Help Sheet

[Client Reconnect – Phorest](#)



SMS / Email Filters

You can target your clients via Automated SMS / Email campaigns

Campaigns > Not visited in the last 90 days Rename

Create a sequence of emails / SMS for clients that have NOT rebooked.

Use the correct filters and this can be repeated automatically, ensuring your clients are reminded to return

FILTER OPTIONS

i AND will filter clients who match **all** of the filters you have set and will give you a more **specific** list of clients

Visit History

Only target certain clients based on their visit history

Note: You can select up to 5 filters only

They have visited In the last 91 Days

AND

They have not visited In the last 90 Days

AND

Cancel

Save

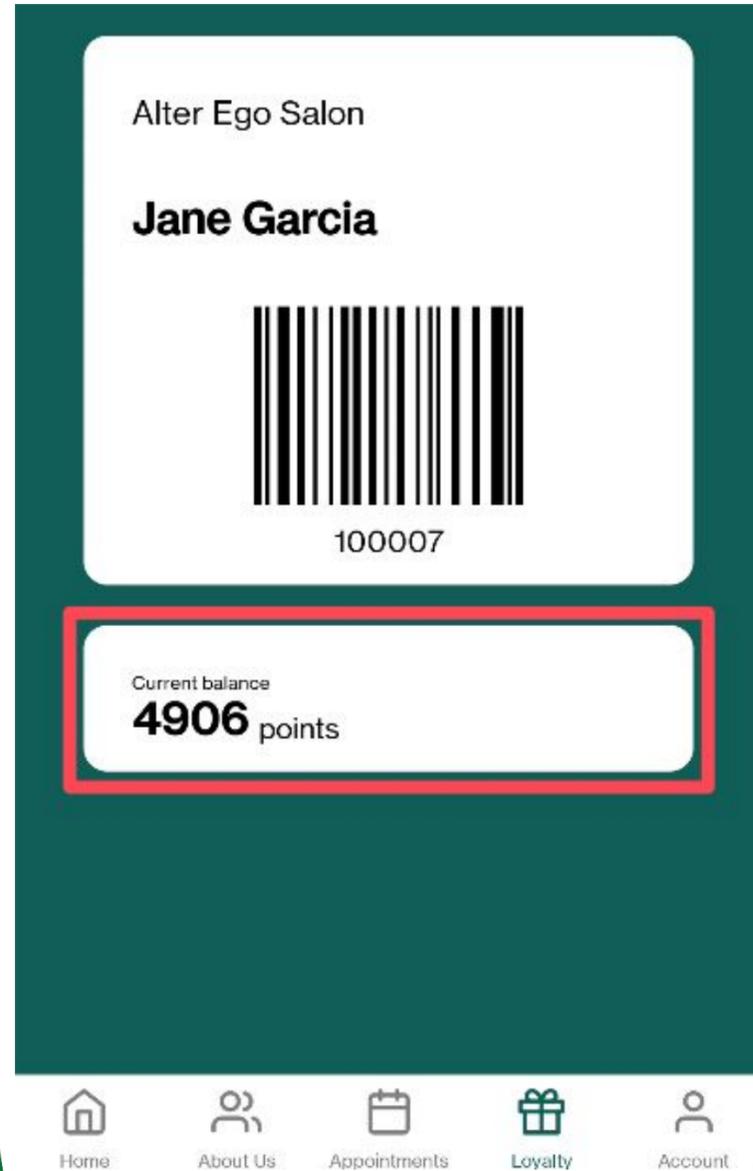
Help Sheet

[How do I set up a recurring email campaign based on client booking history? – Phorest](#)

Overdue Clients

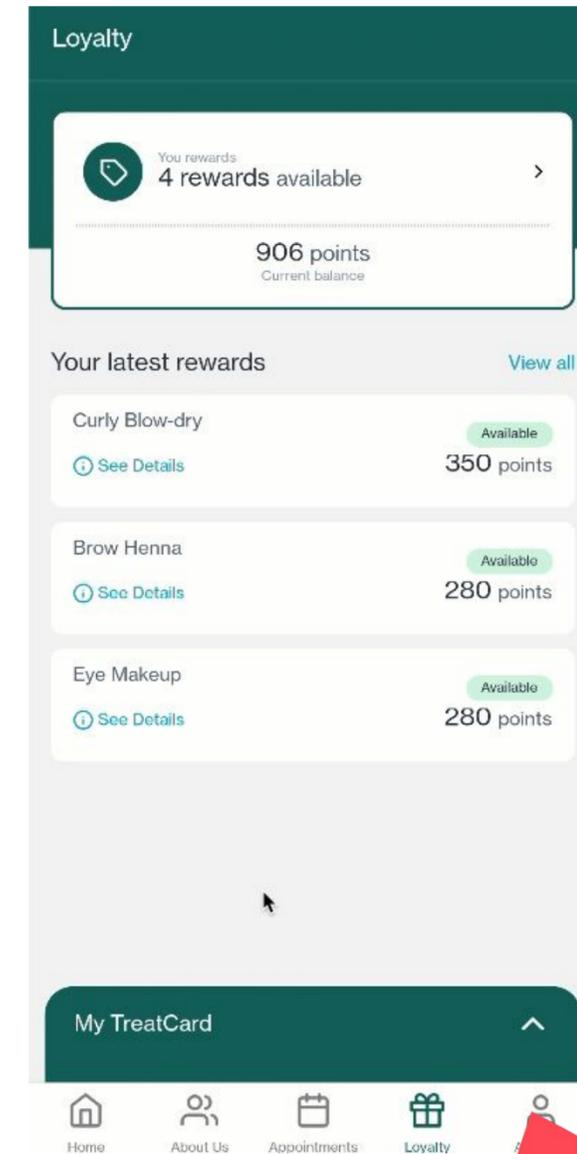
Treatcard

Offer your clients a little extra with a rewards scheme



Reward client spend with points that can be converted to free services or products

Clients can track their points and book their treats using your branded app



Help Sheet

[How can clients view and redeem their TreatCard points online? \(Digital TreatCard\) – Phorest](#)



Overdue Clients

Tracking client retention

In Manager / Reports / Client Retention.

Set date range & refresh.

Date Range Example (based on a 90 day return period)

Visit Period = the month 4 months ago

Returned in the following = 90 days

We need to ensure enough time has passed for the clients to have returned, this report does NOT look at future appointments

Reports Additional Reports

Insights Finance Staff

Dashboards

- Health Dash
- Staff Performance
- Inventory
- Service Trends
- Product Trends
- Future Appointments
- Client Lifetime Value
- Client Retention**
- Gift Cards
- Memberships

Reports

- Staff Reports
- Clients Reports

Visit Period: is in January 2025

Returned in the Following Days: is 90

Date Granularity: Week

Branch Name: is Training Aus 1

3m ago

Retention Dashboard

Retention refers to the percentage of your customers who visited your business within a specific date range and then returned after that within the retention period. A high retention rate indicates that your customers are satisfied with your business, and it can contribute to the long-term success of your company. By focusing on retention, you can build a loyal customer base and increase the likelihood of repeat business.

2	8	
# Clients Retained	# Clients Not Retained	
0.00%	40.00%	20.00%
New Clients Retention Rate %	Existing Clients Retention Rate %	Retention Rate %

Lost Clients



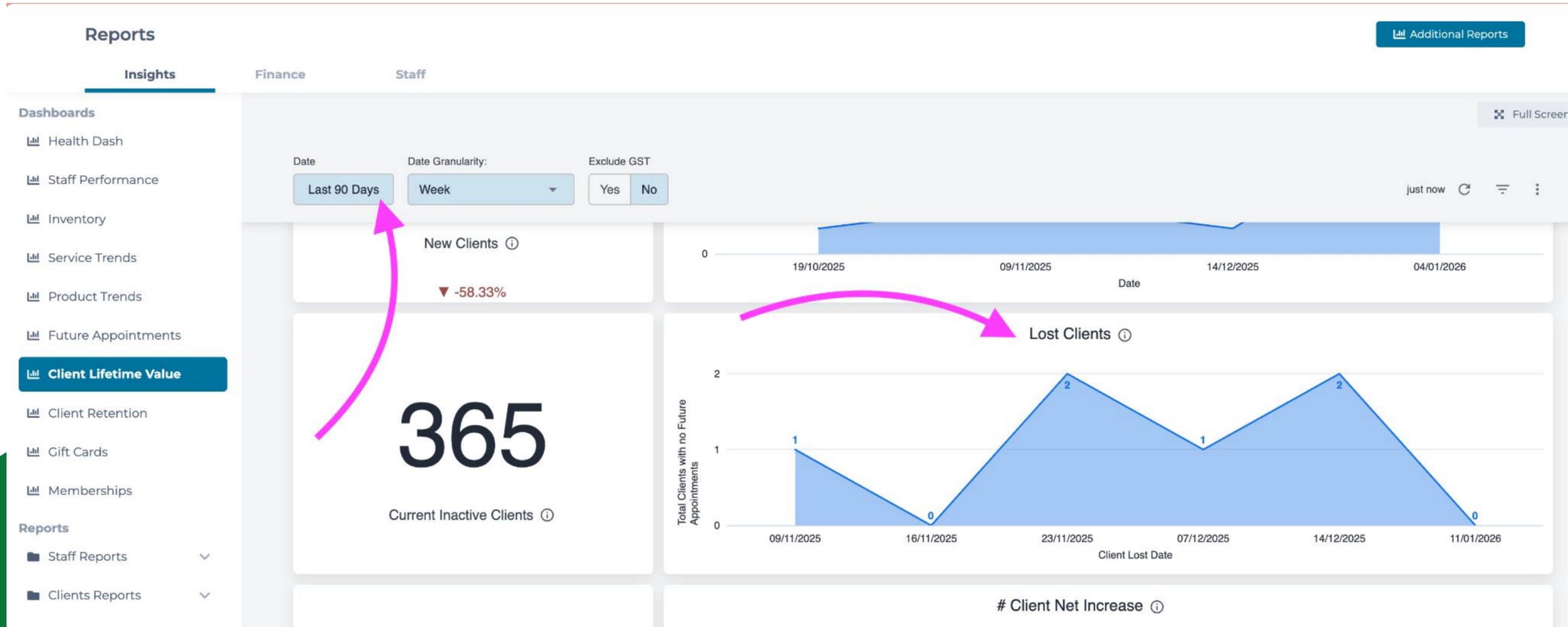
Lost Clients

Understanding your lost client numbers

In Manager / Reports / Client Lifetime Value.
Set date range & refresh.

Lost Clients

This will show you the clients who have not visited in 180 days broken down by the week that client met that milestone.





Lost Clients

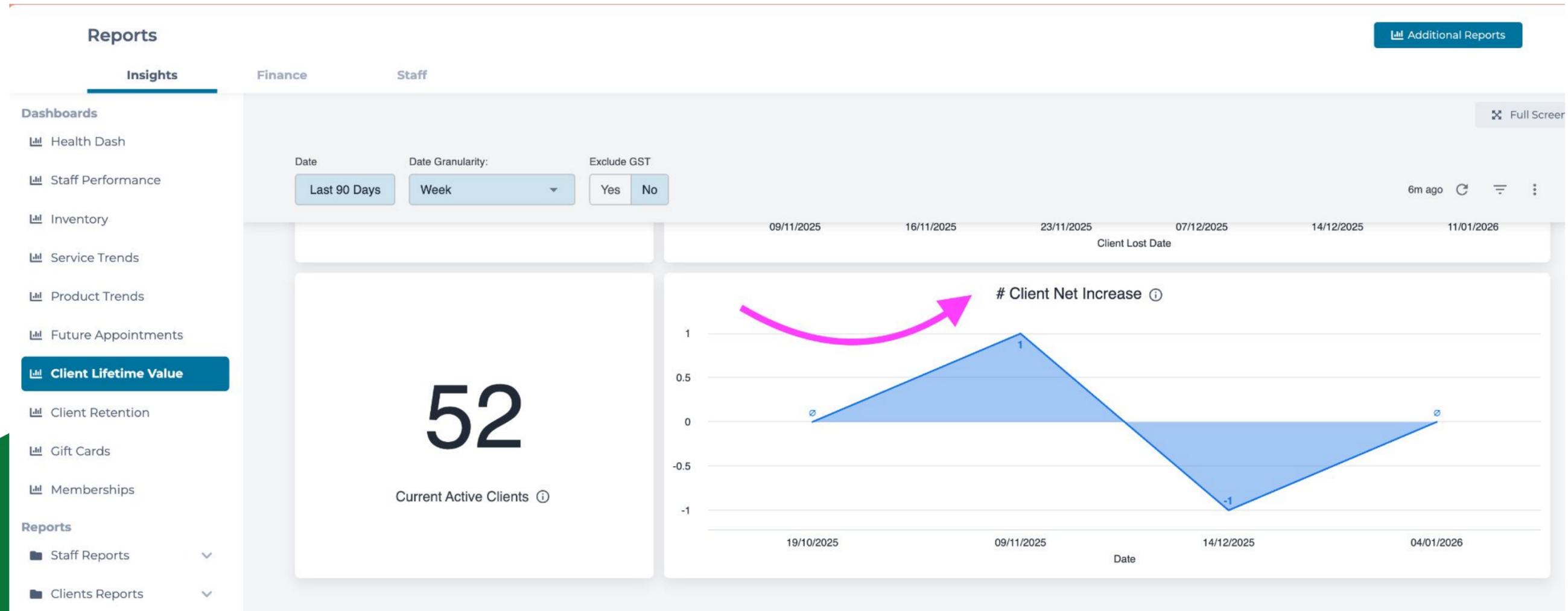
Understanding your lost client numbers

In Manager / Reports / Client Lifetime Value.

Set date range & refresh.

Net Client Increase

This compares your new client figure with lost clients to show you if your client base is increasing / decreasing





Lost Clients

SMS / Email Filters

You can target your clients via Automated SMS / Email campaigns

Create a sequence of emails / SMS for clients that have NOT rebooked.

Use the correct filters and this can be repeated automatically, ensuring your clients are reminded to return

Campaigns > Lost Clients (No Visit 180 Days) Rename

FILTER OPTIONS

i AND will filter clients who match **all** of the filters you have set and will give you a more **specific** list of clients

Visit History

Only target certain clients based on their visit history

Note: You can select up to 5 filters only

They have visited ▼ In the last ▼ 181 Days

AND

They have not visited ▼ In the last ▼ 180 Days 🗑️

AND

Cancel

Save

Help Sheet

[How do I set up a recurring email campaign based on client booking history? – Phorest](#)

Lost Clients

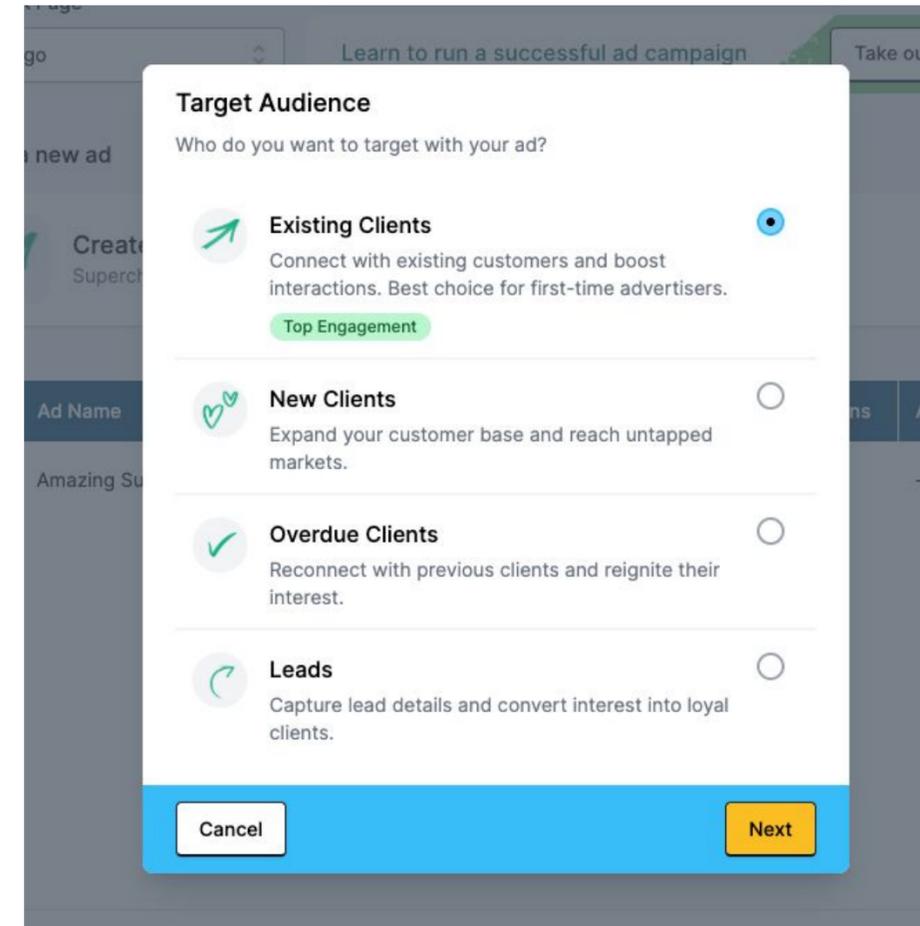
Ad Manager

You can target your lost clients with a Facebook / Instagram ad

Save overdue clients:

Your ad will appear to existing clients who have visited your business at least three times in the past but have not visited it in the last six months.

Only clients who fit this criteria will see this ad making it a cost effective ad to run at the \$5 a day minimum.



Help Sheet

[How do I run ads on Facebook and Instagram through Phorest?](#)

Client Retention

Missing Features ?

[Click Here](#)

Phorest GYM Homepage

[Click Here](#)