

4-Month New Customer Success Plan

A Professional Roadmap for Wellness & Lifestyle Retention

Customer Name:

Enrollment Date:

Preferred Contact:

Month 1: Welcome & Orientation

Goal: Ensure the customer understands their membership benefits and feels confident navigating their first order.

- Confirm first order arrived and assist with unboxing or usage tips.
- Walk through the online store, focusing on product categories and value options.
- Explain how to track and redeem Loyalty Shopping Dollars starting Month 2.
- Invite them to join your customer community group for ongoing support.

Month 2: Product Experience Check-In

Goal: Gather feedback on their first month and encourage them to swap out daily essentials.

- Ask which products have already become household favorites.
- Discuss the benefits of the concentrated, eco-friendly cleaning line.
- Suggest complementary products based on their initial shopping habits.
- Remind them of their active rewards and monthly promotions.

Month 3: Education & Engagement

Goal: Deepen product knowledge and showcase the science behind the wellness lines.

- Provide educational content (wellness tips or ingredient spotlights).
- Introduce seasonal solutions or limited-time wellness bundles.
- Share a success story or testimonial related to their specific wellness goals.
- Review any progress seen since switching stores 90 days ago.

Month 4: Relationship Strengthening

Goal: Solidify trust and move from a trial phase to a long-term lifestyle habit.

- Thank them for their loyalty and ask for feedback on their overall experience.
- Offer a personalized product bundle suggestion for the coming months.
- Mention the referral program or potential for loyalty credits through sharing.
- Invite them to a deeper look at the business opportunity (optional).

Follow-Up Notes: