1. Shrink the Time to First Win

The first win = the first moment the customer thinks "Yes, this is working."

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1 Define your first win (most common customer type)

Ask: "What is the smallest tangible result a customer can see, use or feel?"

Business	Example first win	Mine
Agency	Quick homepage fix + 3 social templates	
Gym	First workout plan + first weigh-in	
Salon	Home styling routine	
Online course	First lesson finished, one small result	

2 Measure: days from payment to first win (last 10 customers)

#	Customer	Paid on	First win on / days
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Average days: _____ Target (half, then half again): _____ Example (Layla): 26 days -> 3 days

3 Cut it with three tools, then tell them the date

Template what repeats (kickoff questionnaire, starter templates)	[ ] Yes [ ] No
Prepare early: send the questionnaire the moment they sign	[ ] Yes [ ] No
Move a small deliverable to the front (e.g. within 72 hours)	[ ] Yes [ ] No
Tell the exact date: "By Thursday you'll have..."	[ ] Yes [ ] No

2. The Seven-Day Onboarding Checklist

Seven short touches in seven days. Anyone on the team can run it.

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1 Day by day

Day	Step	My version	Done
0	Welcome within 1 hour: thanks, what happens next + when, one contact		
1	Kickoff: 90-day goal in numbers, obstacles, what we need; summary		
2-3	Deliver the first win on the promised date		
4	Check-in: "How is it going, 1 to 10?" Under 8 = fix in 48 hours		
5-6	Teach one thing: 2-minute video, one-page guide or demo		
7	Review: what's done, next milestone + date, "Who else might need this?"		

2 Welcome message (three lines)

Example: "Welcome! Your kickoff call is Tuesday at ten. Before then, please fill in this ten-minute form.
I'm Sara, your contact for anything you need."

Mine: _____

3 Kickoff answers (send the summary the same day)

Question	Answer
Success in 90 days, in numbers?	
What could get in the way?	
What we need from them, by when?	

4 Avoid

Owner doing it forever: write it as a checklist (in Systex, loftybiz.net)	[ ] Yes	[ ] No
Long and heavy: seven short touches	[ ] Yes	[ ] No
Feedback with no action: fix scores under 8 within 48 hours	[ ] Yes	[ ] No

Examples only; results vary. General business education, not financial, legal or tax advice.
Free tool from LoftyBiz. More free tools and Systex (our own product): loftybiz.net

3. Your Numbers

Track the start, and what it is worth.

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1 Before and after

Item	Before	After 1-3 months	Change
Days to first win (average)			
New customers a period			
Early cancellations / no return			
Rebooking or renewal rate (%)			
Value of one customer a year ($)			

2 Worked examples (illustrative)

Layla: $8,000 x 12	$96,000 a year	First win	26 -> 3 days
90-day cancels	1 in 4 -> 1 in 12	20 clients a year	~3 more stay
3 x $96,000	$288,000 a year	Sofia: rebooking	30% -> 55%
$60 x 6 visits	$360 a year	25 x $360	$9,000 a year

3 Day-4 check-in log

Customer	Score 1-10	"What would make it a 10?"	Fixed by

4 Do this this week

[ ] Pick your most common type of customer
[ ] Define their first win
[ ] Count days to first win for your last 10 customers
[ ] Write your 7-day checklist, one line per day
[ ] Use it on the very next customer, and put it into Systex

Layla, Sofia and their figures are illustrative. These are examples, not promises. Results vary. General business education, not financial, legal or tax advice.