LoftyBiz First-Week Checklist

List five of your longest-staying customers, find the first actions they share, time your own trial, and remove one step that gets in the way.

From LoftyBiz 143 — From Sign-Up to Habit: Free Trials, First Value and Ongoing Use. Systex is our own product; you can find Systex at loftybiz.net, or click the link in the description.

This week's task

List five of your longest-staying customers and write down what each did in their first week. Circle the one or two actions they all share. Then sign up for your own trial as if you were new, time how long it takes to reach that action, and remove one step that gets in the way. Put the trial emails, class plan and activation checklist into Systex, so the whole team can follow the same steps.

Five longest-staying customers and what they did in week one

Customer (no personal data required)	What they did in their first week
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

The shared first moves

The amber row is an example from the video, not a promise. Replace it with your own.

Shared first action	How you will guide a new user to it
Example only: add a price list, and get a first client booking	Example only: one welcome screen with one button, then a short email sequence
Your first shared action:	
Your second shared action (if any):	

In Ingrid's example, a salon booking tool in Madison (four people, a fourteen-day free trial, about $49 a month) found two money moves: adding a price list, and sharing the booking link so a client booked. In this example, after three months, first bookings in the trial rose from about one in four salons to about one in two, and paying customers went from around 6% of trials to about 11%. These are examples, not promises.

Time your own trial and remove one step

The first action you want a new user to reach	Time it takes today	The one step you will move later or remove	Time after the change
Example only: send a first invoice to a customer	Example only: about 2 days	Example only: tax number asked before any invoice	Example only: under 20 minutes
1.			
2.			

In Rashid's example, an invoicing app for trades in Tulsa (a thirty-day free trial, then about $29 a month) cut time to a first invoice from about two days to under twenty minutes, then built a Friday payment-check habit. In this example, after six months the share of customers still active after three months rose from around half to about seven in ten. These are examples, not promises.

A weekly reason to return

Weekly habit you want	How you will remind people	Notes
Example only: Friday check of who paid and who owes	Example only: a short Friday afternoon email, one click to the list	
1.		
2.		

Example figures. General education, not financial, legal, HR or tax advice. Results vary. These are examples, not promises.