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A photograph of Howard Schultz, CEO of Starbucks, in a meeting. He is wearing a grey suit and a blue tie, gesturing with his hands while speaking to another man whose back is to the camera. The background shows an office setting with windows and a desk.

We are not in the coffee business serving people,  
**we are in the people business serving coffee.**

—— *Howard Schultz* ——



INTRODUCTION

# 24 years in the service industry

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+ ALFIE = 25 YEARS

A woman with long brown hair, wearing a white top, is shown in profile, shouting with her mouth wide open and eyes closed. She is holding a black smartphone in her right hand. The background is a blurred outdoor setting with greenery and a body of water.

# Patient Retention

Nicole Montgomery

**Customer**  
**EXPERIENCE**  
**MATTERS®**

Nicole Montgomery RN



If you take only ONE thing away from that video, we hope it is,



Customer Retention comes from within your clinic/business.

Nicole Montgomery RN

## The UGLY Truth

- **Most clinics Ignore CX & Retention strategies**
  - We have had a string of crazy patients
  - Our marketer let us down
  - It's our competitors sabotaging us
  - We haven't had enough training
  - I don't get paid for overtime
  - The KPI's are unachievable

- Customer lifetime value (or CLTV) measures the profit your business makes from any given customer.
- CLTV is the single most important metric for understanding your customers.



The diagram illustrates the formula for Customer Lifetime Value (CLTV) using icons and text. It consists of four main components arranged horizontally, separated by mathematical symbols. The first component is a circular arrow icon representing a cycle, with the text 'Lifetime Customer Value' below it. This is followed by an equals sign. The second component is a clock icon representing time or average, with the text 'Single Sale Average' below it. This is followed by a multiplication sign. The third component is a circular arrow icon with a dot in the center, representing a repeat or average, with the text 'Repeat Transactions Average' below it. This is followed by another multiplication sign. The fourth component is a circular arrow icon with a bell inside, representing retention, with the text 'Retention Period' below it.

$$\text{Lifetime Customer Value} = \text{Single Sale Average} \times \text{Repeat Transactions Average} \times \text{Retention Period}$$

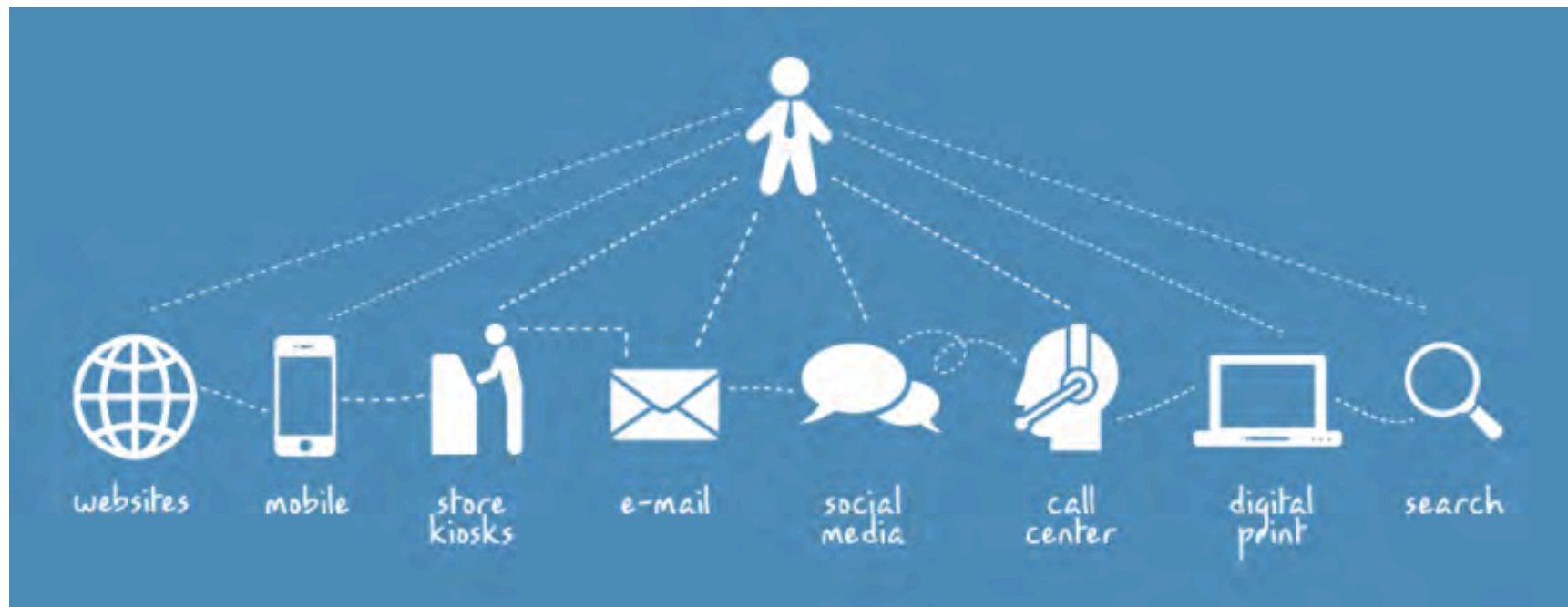
CLTV helps you make important business decisions about sales, marketing, product development, and customer support.





HOW?

Positive touchpoints - positive interactions that will be enough to keep your patients loyal, despite the occasional, and for some inevitable, poor experience. Client relationships should be one of the key focuses of your practice.



A black and white photograph of a person's hands holding a smartphone. The person is wearing a plaid shirt and a ring on their left ring finger. The background is dark and out of focus. The text "Make Appointment Scheduling A Breeze" is overlaid in white, centered on the phone's screen area.

Make Appointment  
Scheduling A Breeze


A modern waiting room with a light grey wall and a dark grey lower half. Several framed artworks are displayed on the wall, including a large landscape painting on the right and two smaller abstract pieces on the left. The room is furnished with grey sofas, armchairs, and a wooden coffee table. A small potted plant sits on a wooden side table. A doorway with a stained glass window is visible in the background.

Sit In Your Own Waiting  
Room For 30 Minutes





Provide ample parking

A pink piggy bank is the central focus, with a black stethoscope draped over its back and chest. The piggy bank is positioned on a white, horizontally-slatted surface. In the background, a blue ocean with white-capped waves stretches to the horizon under a clear blue sky. The text is overlaid on the right side of the image.

According to the National Survey from the Health Policy Institute of the American Dental Association, Why Adults Forego Dental Care, 40 percent of adults don't seek dental care due to the cost.





**79%**

COULD NOT AFFORD  
TREATMENT  
WITHOUT A  
MYHEALTH&BEAUTY  
PAYMENT PLAN

80% FUNDED ONGOING  
TREATMENT SUCH AS  
GENERAL COSMETIC,  
ANTI-AGING, LASER  
AND INJECTABLES

AVERAGE HOUSEHOLD INCOME OF  
RESPONDENTS

32% \$50K - 100K  
18% \$100 - 150K  
20% OVER \$150K

**61%**

PURCHASED  
TREATMENT WORTH  
\$1000 - \$3000 WITH  
A PAYMENT PLAN

**20%**

PURCHASED  
TREATMENT WORTH  
\$3000-\$5000 WITH A  
PAYMENT PLAN

**79**

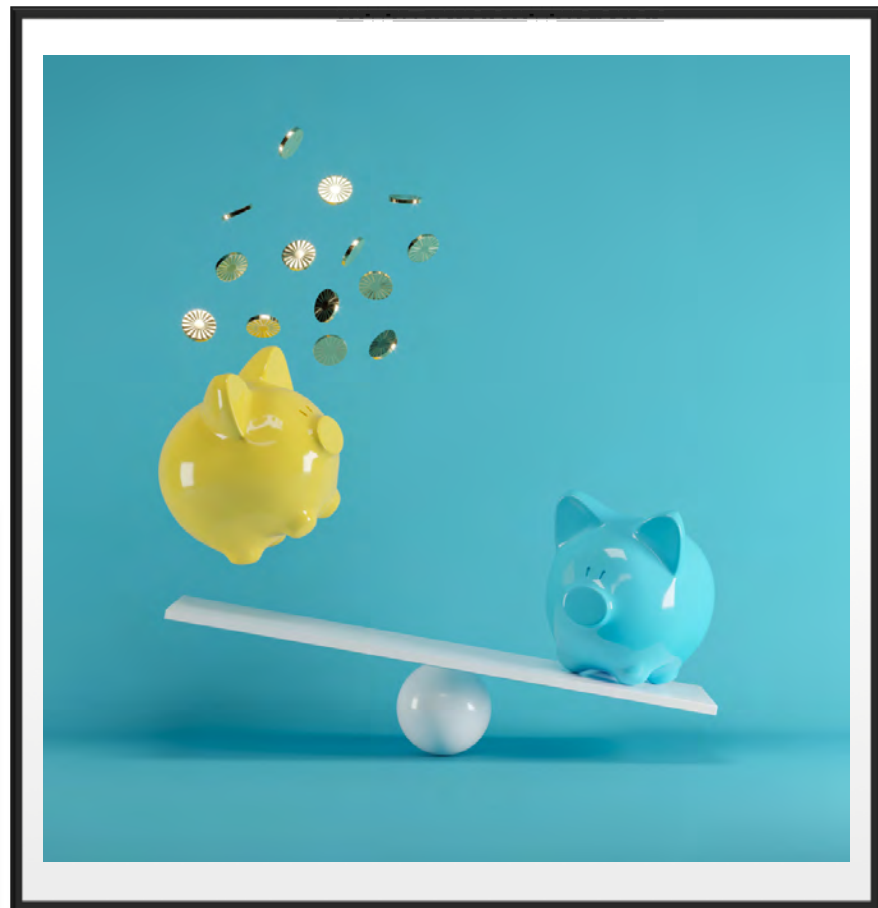
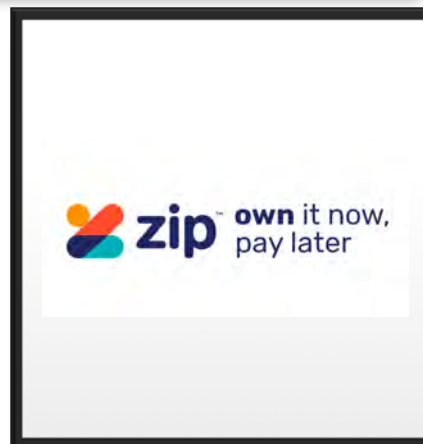
NET PROMOTER SCORE  
MYHEALTH&BEAUTY

(50 CONSIDERED  
EXCELLENT)

APPLE NPS SCORE 70  
CREDIT INDUSTRY 3

98% OF RESPONDENTS WOMEN

94% OF RESPONDENTS AGED  
25 - 54







Try being open during times that no one else in town is.





ASK FOR FEEDBACK



EDUCATE YOUR COMMUNITY



A photograph of three women smiling at a trade show booth. The woman on the left has blonde hair and is wearing a dark blue top. The woman in the middle has brown hair and is wearing a black top with a lanyard around her neck; she is holding a magazine titled "A bold life" with "KEPPI" at the bottom. The woman on the right has dark hair and is wearing a black blazer over a pink top. In the background, there is a potted plant and a sign that partially reads "ECALLY PROVE" and "Papers | 3000+ install".

UTILISE YOUR STAFF

it's the  
little  
things