

Loyalty Planning Worksheet

Agent Name _____ Market/Region _____ Start Date _____ Finish Date _____ Review Date _____	Retention Rates Current _____ Target _____ $\left(\frac{\text{Ending Members} - \text{New Members}}{\text{Starting Members}} \right) \div \text{Starting Members} = \text{Retention Rate}$
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Loyalty Initiatives

List two to four initiatives you will implement throughout the year to help improve member loyalty and retention. Outline obstacles to address, execution plan details and resource planning.

Q1

Initiatives	Time Commitment to Success

Q2

Initiatives	Time Commitment to Success

Q3

Initiatives	Time Commitment to Success

Q4

Initiatives	Time Commitment to Success

(continued)

Loyalty Action Items

Q1

Action Items	Potential Obstacles

Q2

Action Items	Potential Obstacles

Q3

Action Items	Potential Obstacles

Q4

Action Items	Potential Obstacles