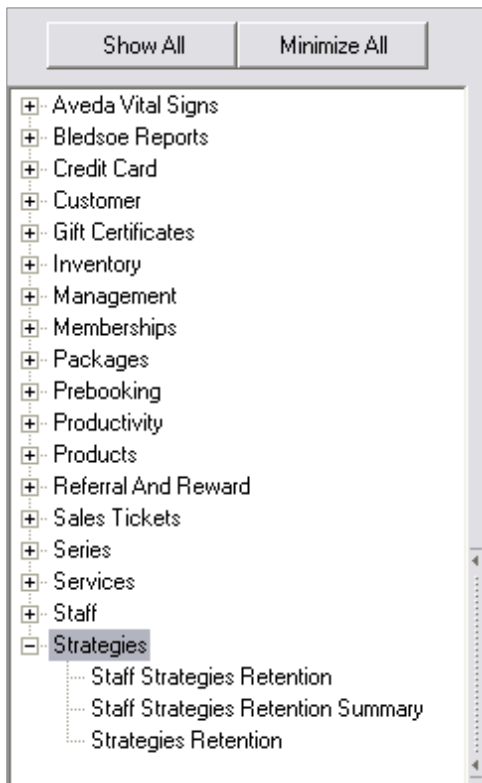


strategies reports

Use this guide as a reference tool for the Strategies reports.



Staff Strategies Retention

The Staff Strategies Retention report provides you with information on new client retention as well as existing client retention details for the entire salon/spa and each service staff member for a specific date range.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Strategies Retention from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.
5. Select staff to view.
6. Click the Ok button.

Staff Strategies Retention Summary

The Staff Strategies Retention Summary report lists the information from the Staff Strategies Retention report in summary form.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Staff Strategies Retention Summary from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.

Strategies Retention

The Strategies Retention report provides an overall salon retention summary.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Double click on Strategies Retention from the report list side navigation. You will find it under the Strategies category.
3. Enter the date range.
4. Enter an ending date for the retention period.



Report Parameter Dates

We recommend a 90-day period for a client to be considered retained. This will give you an outline of the dates to use when creating retention reports.

January

Starting date 1/1
Ending date 1/31
Retention date 4/1

February

Starting date 2/1
Ending date 2/28
Retention date 5/1

March

Starting date 3/1
Ending date 3/31
Retention date 6/1

April

Starting date 4/1
Ending date 4/1
Retention date 7/1

May

Starting date 5/1
Ending date 5/31
Retention date 8/1

June

Starting date 6/1
Ending date 6/30
Retention date 9/1

July

Starting date 7/1
Ending date 7/31
Retention date 10/1

August

Starting date 8/1
Ending date 8/31
Retention date 11/1

September

Starting date 9/1
Ending date 9/30
Retention date 12/1

October

Starting date 10/1
Ending date 10/31
Retention date 1/1

November

Starting date 11/1
Ending date 11/30
Retention date 2/1

December

Starting date 12/1
Ending date 12/31
Retention date 2/1

