**Strategy Plan: Client Database & Customer Experience Reporting**

**Objective:** Create a data-driven system to track, analyse, and improve customer experiences, retention, and revenue opportunities.

**Phase 1: Build the Client Database (Months 0–3)**

**Step 1: Define Data Requirements**

* **Core Data Categories:**
  1. **Demographics:** Age, location, tech proficiency, family status (e.g., grandkids’ ages).
  2. **Membership Details:** Tier (Basic/Silver/Gold), subscription dates, payment history.
  3. **Engagement Metrics:** Forum activity (posts, comments), tutorial completion rates, webinar attendance.
  4. **Purchasing Behaviour:** Products bought via affiliate links, discount usage, cart abandonment rate.
  5. **Support Interactions:** Ticket frequency, resolution time, feedback ratings.
  6. **Feedback & Surveys:** NPS, CSAT scores, qualitative comments.
* **Segmentation Tags:**
  1. High-Value (Gold-tier, frequent shoppers).
  2. At-Risk (Lapsed subscriptions, low engagement).
  3. Tech-Challenged (Repeated support queries).

**Step 2: Select Tools**

* **CRM Platform:** HubSpot (free tier for startups) or Salesforce (scalable for enterprise).
* **Database Integration:** Use Zapier to connect surveys (Type form), payment systems (Stripe), and support tools (Zendesk).
* **Accessibility:** Ensure GDPR/CCPA compliance for data privacy.

**Step 3: Populate Initial Data**

* Import existing user data from sign-up forms, payment records, and support logs.
* Add tags for segmentation (e.g., “High-Value” for users spending $100+/month).

**Phase 2: Design Customer Experience Reporting System (Months 3–6)**

**Step 1: Define Key Metrics**

* **Primary KPIs:**
  + **NPS (Net Promoter Score):** Measure loyalty via quarterly surveys.
  + **CSAT (Customer Satisfaction):** Post-support interaction surveys.
  + **Retention Rate:** % of users renewing subscriptions after 6/12 months.
  + **Engagement Score:** Weighted average of forum activity, tutorial views, and event attendance.
  + **Revenue per User (RPU):** Total revenue (subscriptions + affiliate) divided by active users.

**Step 2: Build Reporting Dashboards**

* **Tools:**
  + Google Data Studio or Tableau for visual dashboards.
  + HubSpot CRM for automated reports.
* **Dashboard Tabs:**
  1. **User Health Overview:** Retention rates, NPS trends, support ticket volume.
  2. **Segmentation Analysis:** Engagement and spending by tier.
  3. **Opportunity Alerts:** At-risk users, high potential upsell targets.

**Step 3: Automate Reporting**

* Schedule monthly/quarterly reports to stakeholders.
* Example automation:
  + **Monthly:** Email PDF report with top KPIs to leadership.
  + **Real-Time Alerts:** Slack notifications for sudden drops in engagement or NPS.

**Phase 3: Conduct Data Reviews & Audits (Months 6–12)**

**Step 1: Quarterly Client Audits**

* **Audit Scope:**
  + **New Users (0–90 days):** Track onboarding success (e.g., % completing tutorials).
  + **At-Risk Users:** Identify lapsed subscriptions or declining engagement.
  + **High-Value Users:** Analyze spending patterns for upsell opportunities.
* **Audit Process:**
  1. Pull data for the target cohort (e.g., “Users who canceled in Q3”).
  2. Identify trends (e.g., 60% of cancellations cited “tech difficulties”).
  3. Map actionable recommendations (e.g., offer free 1:1 tech onboarding).

**Step 2: Annual Deep-Dive Review**

* **Focus Areas:**
  + Year-over-year retention trends.
  + Impact of new features (e.g., did adding video tutorials boost Silver-tier upgrades?).
  + ROI of partnerships (e.g., affiliate revenue from Walmart vs. Amazon).

**Step 3: Report Structure for Stakeholders**

**Template:** *Grandparents Hub Client Audit Report – Q3 2024*

1. **Current Position:**
   * “30% of Basic-tier users attend webinars but don’t upgrade.”
2. **Opportunities:**
   * Offer a limited-time Silver-tier discount to webinar attendees.
3. **Rationale:**
   * “Webinar attendees are 3x more likely to upgrade if incentivized.”

**Phase 4: Optimize & Scale (Ongoing)**

**Step 1: Personalize Customer Journeys**

* Use CRM tags to trigger automated workflows:
  + **Example:** If a Silver-tier user watches a “Holiday Gift Guide” tutorial → Send a curated product list with 10% discount.

**Step 2: Close Feedback Loops**

* **Action:** Assign a team member to follow up with users who submit low CSAT scores.
* **Tool:** HubSpot Service Hub to track resolution progress.

**Step 3: Expand Revenue Streams**

* Leverage data to pitch brands:
  + “70% of Gold-tier users buy toys → Partner with Lego for sponsored content.”

**Tools & Budget**

| **Tool** | **Purpose** | **Cost** |
| --- | --- | --- |
| HubSpot CRM | Client database & automation | Free–$800/month |
| Google Data Studio | Reporting dashboards | Free |
| Typeform | NPS/CSAT surveys | $25–50/month |
| Zapier | Data integration | $20–100/month |

**KPIs & Success Metrics**

* Increase Gold-tier retention by 20% in 12 months.
* Achieve NPS ≥ 40 by Month 9.
* Reduce support ticket resolution time to < 12 hours.

**Example: High-Value User Case Study**

**User Profile:**

* Gold-tier subscriber, 68 years old, refers 3 friends/month.  
  **Data Insights:**
* Attends 90% of VIP events, uses 1:1 shopping assistants weekly.  
  **Action:**
* Offer a “Community Ambassador” role with exclusive perks (e.g., 15% discounts).