

FROM FIRST TOUR TO LONG-TERM LOYALTY

Designing the Family & Staff Lifecycle Journey

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RETENTION BEGINS BEFORE ANYONE IS THINKING ABOUT LEAVING.

Every interaction shapes what families and staff feel, believe, and choose next.

FROM FIRST TOUR TO LONG-TERM LOYALTY

REFLECTION ACTIVITY

START WITH ONE REAL PERSON

Think of one family or staff member whose trust changed over time.
What small moments shaped their story?

60 seconds

FROM FIRST TOUR TO LONG-TERM LOYALTY

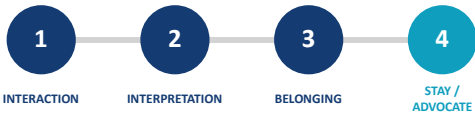
TODAY, YOU WILL LEAVE WITH A MAP AND A NEXT MOVE



- See retention as an experience-design challenge
- Map five stages for both families and staff
- Spot the moments that build or erode trust
- Use the 5:1 principle as an interaction lens
- Design one connection point you can use immediately

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EXPERIENCE BECOMES A RETENTION SIGNAL



Patterns, not isolated programs, teach people what to expect here.

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RETENTION IS BUILT ACROSS FIVE STAGES



The journeys are parallel, not interchangeable

FROM FIRST TOUR TO LONG-TERM LOYALTY

FIELD ACTIVITY

WHICH STAGE IS MOST OVERLOOKED IN YOUR PROGRAM?

Choose one

- ☒ A Entry
- ☐ B Early Engagement
- ☐ C Relationship Building
- ☐ D Milestones & Growth
- ☐ E Exit & Transition

There is no perfect answer. Simply just notice the pattern.

FROM FIRST YEAR TO LONG TERM LOYALTY

A "MOMENT THAT MATTERS" CHANGES THE STORY

- Expectations are set
- Uncertainty is high
- Feedback is needed
- Identity or progress is recognized
- The relationship is tested or ending



Ask: What will this moment teach them about us?

FROM FIRST YEAR TO LONG TERM LOYALTY

THE LIFECYCLE EXPERIENCE MAP

STAGE 1 - ENTRY



Does our first experience feel personal, clear, and trustworthy?

FROM FIRST YEAR TO LONG TERM LOYALTY

ENTRY MOMENTS SET THE EMOTIONAL CONTRACT

FAMILIES

- Response to inquiry
- Tour welcome and listening
- Clarity about fit and expectations
- Personalized follow-up
- Enrollment celebration

STAFF

- Application response
- Interview tone and transparency
- Clarity about role and support
- Offer follow-up
- Pre-start welcome

FROM FIRST TOUR TO LONG-TERM LOYALTY

A TOUR IS A TRUST-BUILDING CONVERSATION

BEFORE

Confirm needs, names, and priorities

DURING

Listen first; connect what they value to real practice

AFTER

Follow up with one specific detail you noticed

*The goal is not to impress.
It is to help a family imagine belonging.*

FROM FIRST TOUR TO LONG-TERM LOYALTY

AN INTERVIEW IS ALSO A PREVIEW OF LEADERSHIP



Do we explain the real work?

Do we show how support happens?

Do we invite honest questions?

Do we close the loop on time?

FROM FIRST TOUR TO LONG-TERM LOYALTY

THE LIFECYCLE EXPERIENCE MAP

STAGE 2 - EARLY ENGAGEMENT



Do their first days match the promise we made?

FROM FIRST TOUR TO LONG-TERM LOYALTY

THE FIRST WEEK CAN CREATE CONFIDENCE OR CONFUSION

CONFIDENCE

- A named point person
- A clear next step
- A warm welcome by name
- A simple visual guide
- A check-in before problems grow

CONFUSION

- No one expects their arrival
- Information arrives all at once
- Questions feel inconvenient
- Different people give different answers
- Silence is mistaken for success

FROM FIRST TOUR TO LONG-TERM LOYALTY

POLL ACTIVITY

WHAT MOST OFTEN WEAKENS EARLY ENGAGEMENT?

Choose one

- ☐ A Information overload
- ☐ B Unclear roles or next steps
- ☐ C Inconsistent follow-through
- ☐ D No relationship anchor
- ☐ E All of the above

There is no perfect answer. Simply just notice the pattern.

FROM FIRST TOUR TO LONG-TERM LOYALTY

BUILD A 3-2-1 WELCOME RHYTHM

3

PERSONAL TOUCHES

Name
Preference
Strength

2

PROACTIVE CHECK-INS

Before Day 1
End of Week 1

1

CLEAR RELATIONSHIP ANCHOR

One person who owns the follow-through

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THE LIFECYCLE EXPERIENCE MAP

STAGE 3 - RELATIONSHIP BUILDING



What do our everyday patterns teach people about their place here?

FROM FIRST TOUR TO LONG-TERM LOYALTY

DAILY DEPOSITS ARE SMALL ENOUGH TO REPEAT

- ✓ Use names and make eye contact
- ✓ Notice effort or progress specifically
- ✓ Share one meaningful moment, not just logistics
- ✓ Check in before you need something
- ✓ Follow through when you say you will
- ✓ Repair quickly when an interaction misses



SMALL THINGS. OFTEN.

FROM FIRST TOUR TO LONG-TERM LOYALTY

FEEDBACK LANDS DIFFERENTLY WHEN TRUST IS PRESENT

SEE Name a real strength or contribution

SAY Describe the observable behavior and its impact

SUPPORT Agree on the next step and how you will help

Clear is kind. Follow-through makes it credible.

FROM GREAT TOGETHER TO GROWING TOGETHER

POLL ACTIVITY

WHICH INTERACTION IS A MISSED DEPOSIT?

Choose one

- ☐ A A warm greeting by name
- ☐ B Observation with no follow-up
- ☐ C A specific thank-you
- ☐ D A private, respectful concern conversation
- ☐ E A check-in after a hard day

There is no perfect answer. Simply just notice the pattern.

FROM GREAT TOGETHER TO GROWING TOGETHER

NEUTRAL IS OFTEN A MISSED OPPORTUNITY.

"Everything was fine."
Silence after an observation.
Walking past without acknowledgment.

None may be harmful alone, but patterns communicate.



FROM GREAT TOGETHER TO GROWING TOGETHER

REFLECTION ACTIVITY

RELATIONSHIP PATTERNS

When do people mostly hear from you -
when something is wrong, or throughout
the relationship?

60 seconds

FROM FIRST TOUR TO LONG TERM LOYALTY

THE LIFECYCLE EXPERIENCE MAP

STAGE 4 - MILESTONES & GROWTH



Do people see a future and know that we see their progress?

FROM FIRST TOUR TO LONG TERM LOYALTY

RECOGNITION SAYS "WE NOTICE" GROWTH SAYS "WE INVEST"

RECOGNIZE

- Name the specific contribution
- Connect it to impact
- Choose a form the person values
- Celebrate progress, not only outcomes

CULTIVATE

- Ask about goals and interests
- Offer practice and support
- Make pathways visible
- Revisit progress consistently

FROM FIRST TOUR TO LONG TERM LOYALTY

USE A 5:1 LENS BEFORE HIGH-STAKES CONVERSATIONS

5 : 1

Have we built a pattern of genuine positive connection and not just saved compliments for this meeting?

The goal is not to soften the truth. The goal is enough trust to hear it.

FROM GREAT TALKS TO GOOD TEAMWORK

ROLL ACTIVITY

WHERE IS RECOGNITION LEAST CONSISTENT?

Choose one

- ☐ A Everyday effort
- ☐ B New skills and growth
- ☐ C Family partnership
- ☐ D Milestones and transitions
- ☐ E It is consistent across all areas

There is no perfect answer. Simply just notice the pattern.

FROM GREAT TALKS TO GOOD TEAMWORK

REFLECTION ACTIVITY

DESIGN ONE RECOGNITION RITUAL

What will you notice, how will you name it, and when will it happen?

Keep it personal, specific, equitable, and repeatable.

60 seconds

FROM GREAT TALKS TO GOOD TEAMWORK

THE LIFECYCLE EXPERIENCE MAP

STAGE 5 - EXIT & TRANSITION



Will the final chapter protect dignity, learning, and connection?

FROM FIRST TOUR TO LONG-TERM LOYALTY

CLOSE THE LOOP WITH CARE

ACKNOWLEDGE

Name the transition

LISTEN

Invite the real story

CLARIFY

Explain next steps

APPRECIATE

Honor the contribution

LEARN

Capture one improvement

A thoughtful ending is a final moment that matters.

FROM FIRST TOUR TO LONG-TERM LOYALTY

POLL ACTIVITY

WHAT IS THE BIGGEST MISSED OPPORTUNITY AT EXIT?

Choose one

- ☐ A No meaningful thank-you
- ☐ B Little or no listening
- ☐ C Unclear transition communication
- ☐ D No learning is captured
- ☐ E All of the above

There is no perfect answer. Simply just notice the pattern.

FROM FIRST TOUR TO LONG-TERM LOYALTY

RETENTION IS NOT ONLY KEEPING. IT IS ALSO REPUTATION.

People remember how they were treated when the relationship became difficult or ended.



THE 5:1 PRINCIPLE: A LENS, NOT A SCORECARD

5 : 1

POSITIVE INTERACTIONS

NEGATIVE INTERACTION

ORIGINAL CONTEXT

Gottman's relationship research examined positive and negative interactions during conflict.

WORKPLACE USE

Use it to notice and intentionally rebalance patterns.

FROM FIRST TALK TO LEAD: TERRY LOVELACE

WHAT COUNTS AS A POSITIVE INTERACTION?

IT CAN BE

- Warm acknowledgment
- Specific appreciation
- Curious listening
- Encouragement
- Reliable follow-through
- Respectful repair

IT IS NOT

- Avoiding accountability
- Vague or performative praise
- Agreeing with everything
- Ignoring concerns
- Forced cheerfulness
- A transaction designed to earn compliance

FROM FIRST TALK TO LEAD: TERRY LOVELACE

TURN COMMON MOMENTS INTO DEPOSITS

DEFAULT

"Everything was fine."

Silence after an observation

"We've discussed this."

Generic tour follow-up

DESIGNED

"Mila invited a friend into block play today."

"I noticed your calm transition. One next step..."

"Let's reset the expectation and the support."

"You mentioned outdoor learning..."

FROM FIRST TOUR TO LONG-TERM RELATIONSHIP

LOOK AT YOUR PROGRAM'S EXPERIENCE JOURNEY



FROM FIRST TOUR TO LONG-TERM RELATIONSHIP

- 1 Where is uncertainty highest?
- 2 Where do promises and reality diverge?
- 3 Where do we mostly communicate problems?
- 4 Whose progress is least visible?
- 5 Where does the relationship end without closure?

YOUR SEVEN-DAY INTERACTION CHALLENGE

NOTICE

When do you connect only because something is wrong?

TRACK

Mark positive, corrective, and missed interactions... without judgment.

REBALANCE

Add one genuine deposit at a high-value moment each day.

*Observe the pattern.
Improve the experience.
Repeat.*

FROM FIRST TOUR TO LONG-TERM RELATIONSHIP

REFLECTION ACTIVITY

CHOOSE YOUR NEXT MOVE

In the next seven days, I will redesign
(lifecycle stage) for _____ by
_____.

*Optional chatbox moment: share the lifecycle stage you
chose.*

60 seconds

FROM GREAT TOURS TO GREAT TOURS LUNCH

RECAP:

DESIGN THE JOURNEY ONE INTERACTION AT A TIME



- Retention is an accumulated relationship outcome.
- Families and staff move through five parallel stages.
- Moments matter most when uncertainty or vulnerability is high.
- The 5:1 principle helps leaders notice interaction patterns.
- One small, owned connection point can change the experience.

WHEN YOU CHANGE THE EXPERIENCE, YOU CHANGE THE STORY.

Don't let the experience stop here.

Choose your next step and keep building the moments that strengthen connection, trust, and retention.



KEEP THE MOMENTUM GOING



GRAB THE RESOURCES

Download your 7 Day
Discovery Challenge and
explore additional
leadership resources
designed to help you turn
everyday interactions into
change experiences for
staff and families.

KEEP LEARNING WITH IGNITE



EXPLORE RETENTION COURSES

Continue building your
retention strategy with
additional courses focused
on leadership, coaching,
connection, and creating
experiences people want
to stay part of.

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FROM FIRST TOUR TO LONG-TERM LOYALTY

START WITH ONE REAL PERSON

Think of a family or staff member whose trust changed over time. What small moments shaped their story?

THE FIVE-STAGE LIFECYCLE AUDIT

Rate each stage 1-5, then capture a moment gap at each stage in your program that might need some attention.

STAGE	LIFECYCLE	MOMENT EXAMPLES	RATING + MOMENT
1	ENTRY	Family: inquiry, tour, follow-up Staff: application, interview, pre-start welcome	1 2 3 4 5 Gap: _____
2	EARLY ENGAGEMENT	Do first days match the promise? Look for a named anchor, clear next step, paced information, and proactive check-in.	1 2 3 4 5 Gap: _____
3	RELATIONSHIP BUILDING	Names, eye contact, meaningful moments beyond logistics, specific feedback, follow-through, and quick repair.	1 2 3 4 5 Gap: _____
4	MILESTONES & GROWTH	Recognition of contribution and progress; goals, practice, support, and visible pathways.	1 2 3 4 5 Gap: _____
5	EXIT & TRANSITION	Acknowledge, listen, clarify, appreciate, and capture learning while protecting dignity and connection.	1 2 3 4 5 Gap: _____

RELATIONSHIP PATTERNS

When do people mostly hear from you - when something is wrong, or throughout the relationship?

Positive deposits: _____

Corrective/missed moments: _____

Pattern I notice: _____

DESIGN ONE RECOGNITION RITUAL

Keep it personal, specific, equitable, and repeatable.

What will I notice? _____

How will I name it? _____

When will it happen? _____

5:1 LENS IS NOT A SCORECARD

Notice patterns and intentionally rebalance. Accountability still belongs; trust helps it land.

LIFECYCLE REDESIGN NOTES - Where is uncertainty highest? Where do promise and reality diverge? Whose progress is least visible? Where does a relationship end without closure?

NOTICE. TRACK. REBALANCE.

OBSERVE WITHOUT JUDGMENT. MARK POSITIVE, CORRECTIVE, AND MISSED INTERACTIONS.
ADD ONE GENUINE DEPOSIT AT A HIGH-VALUE MOMENT EACH DAY.

NOTICE

Where do I connect only because something is wrong? What missed moment did I see?

TRACK

Mark positive (P), corrective (C), and missed interactions (M).

REBALANCE

What one specific, useful, genuine deposit did I add?

DAY	NOTICE	TRACK	REBALANCE
1		P__ C__ M__	
2		P__ C__ M__	
3		P__ C__ M__	
4		P__ C__ M__	
5		P__ C__ M__	
6		P__ C__ M__	
7		P__ C__ M__	

CHOOSE YOUR NEXT MOVE

In the next seven days, I will redesign _____ (lifecycle stage) for _____ (family or staff member) by _____ (actions).

I will start by: _____ (date) I will do it by: _____ (date)

My Accountability Person: _____

Signature of commitment

WHEN YOU CHANGE THE EXPERIENCE, YOU CHANGE THE STORY.

Don't let the experience stop here.

Keep building the moments that strengthen connection, trust, and retention.

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