



The Client Retention Report



855-478-7920 | 304 Ohio St. | Oshkosh, WI 54902
Revised July 11, 2019

Table of Contents

Client Retention	3
Run the Client Retention Report	3
Sample of Client Retention Statistics Report	4
Information Searches	5
Search #1	5
Search #2	5
Search #3	6

Client Retention

The Client Retention report allows you to compare the number of active clients, the number of new clients, and the percentages of clients lost and retained for different periods of time (either months or years). It can be run for a particular zip code or company or for all companies.

Run the Client Retention Report

From the CID menu, click on **Work with | Practice Analysis**.

1) Select the time frame you want to compare.

2) Select the Client Retention report.

3) Choose a zip code or company; OR, don't choose an option if printing for all companies and zip codes.

4) Select the time frame that you consider clients to be active if they've had an invoice after this date.

5) Select either the # of years or the # of months to compare (maximum of 5 years or 12 months)

Sample of Client Retention Statistics Report

Date of Report:

7/8/2005

Loving Care Animal Hospital

Page: 1

Start Date:

1/1/2005

CLIENT RETENTION STATISTICS

End Date:

12/31/2005

	2005	2004	2003
#1 Active clients at beginning of time frame	77	52	46
#2 Active clients at end of time frame	105	71	52
#3 New Clients	29	40	4
#4 Active and New Clients #1 plus #3	106	92	50
#5 Clients Lost #4 minus #2	1	21	-2
#6 % Clients Lost #5 divided by #1	1%	40%	-4%*
#7 % Clients Retained 100% minus #6	99%	60%	104%

*A negative number indicates a gain rather than a loss

1Looks at acct type equal to 1 with date range of first date following "invoice after" date through the first date before reporting period.

2Looks at accounting type equal to 1 and date range of "invoice after" date through last date of reporting period.

3Looks at clients with an Added date during the reporting period. (doesn't consider whether they've had accounting or not)

4The number of Active clients at beginning of time frame plus the number of new clients (1 + 3)

5The number of Active and New Clients minus the number of Active clients at end of time frame (4 minus 2)

6Number of clients lost divided by the number of active clients at beginning of time period (5 divided by 1)

7The difference of the percentage of clients lost from 100% (100% minus #6). You can also get this figure by calculating #2 minus #3 divided by #1.

Information Searches

You may run information searches to reconcile with the figures from #1, #2, and #3. It is not necessary to view the report, just move the Print Report or Document window out of the way and view the number displayed beside "Clients" at the bottom of the search window.

Search #1

This search finds the number of active clients at the beginning of the time frame. Time Frame = The day after the date in the "Invoices after" field through the day before reporting period.

Date of Report:	7/8/2005	Deborah's Celebrity AVIMARK		Page: 1
Name:	1st Client Retention	INFORMATION SEARCH		
Print/Report		Comparison	Value(s)	Report?
Client criteria				
Account No.		(none)		YES
Col:	1 Width:	7	Heading: Account No.	0, (not sorted)
Account criteria				
Type		Equal To	I	
(Not reported)				
Date		Between	010102,12-31-04	
(Not reported)				

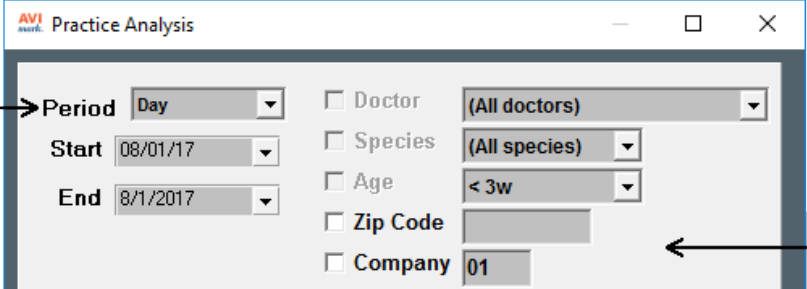
Search #2

This search finds the number of active clients at the end of the time frame. Time Frame = The "Invoice after" date through the End date of the reporting period.

Date of Report:	7/8/2005	Deborah's Celebrity AVIMARK		Page: 1
Name:	2nd Client retention	INFORMATION SEARCH		
Print/Report		Comparison	Value(s)	Report?
Client criteria				
Account No.		(none)		YES
Col:	1 Width:	7	Heading: Account No.	0, (not sorted)
Account criteria				
Type		Equal To	I	
(Not reported)				
Date		Between	12-31-01,07-08-05	
(Not reported)				

Search #3

This search finds the number of clients added during the reporting period.



The screenshot shows the 'AVI Practice Analysis' search interface. It includes the following fields and options:

- Period:** A dropdown menu set to 'Day'. An annotation '1) Select the time frame you want to compare.' points to this field.
- Start:** A date dropdown set to '08/01/17'.
- End:** A date dropdown set to '8/1/2017'.
- Doctor:** A dropdown menu set to '(All doctors)'. There is an unchecked checkbox next to the label.
- Species:** A dropdown menu set to '(All species)'. There is an unchecked checkbox next to the label.
- Age:** A dropdown menu set to '< 3w'. There is an unchecked checkbox next to the label.
- Zip Code:** An empty text input field. There is an unchecked checkbox next to the label.
- Company:** A text input field containing '01'. There is an unchecked checkbox next to the label. An annotation '3) Choose a zip code or company; OR, don't choose an option if printing for all' points to this field.