Catch memberships before they lapse

> *“People sign up for a monthly package and then quietly stop, and I don't notice until the revenue is already gone.”*

Category: billing **Setup Time:** ~30 minutes **Estimated Hours Saved:** 2 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Trigger a reminder before the renewal date rather than chasing after a failed payment. Most memberships lapse from an expired card or a forgotten commitment, not a decision to leave. A notice a week out plus an automatic retry on a declined card recovers most of what would otherwise silently disappear, and takes no ongoing attention once set.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking or membership system: (Free Tier / Wholesale)**
- **Stripe: (paid)**
- **Square: (paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **List every recurring arrangement you actually have**
   Memberships, packages, prepaid sessions. Most businesses find at least one category nobody is tracking.

2. **Turn on card-updater if your processor offers it**
   Expired and reissued cards cause more lapses than cancellations. Card-updater services refresh them automatically and it is often free.

3. **Send a notice seven days before renewal**
   State the amount and the date. It reduces disputes, and someone who wants to change plans tells you before the charge rather than after.

4. **Set automatic retries on a declined payment**
   Three attempts across a week recovers a large share of failures. A single attempt then silence is what loses the member.

5. **Alert yourself when retries fail**
   That is the point where a human should call. A short personal call at that moment saves memberships that no email will.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Will reminding people give them a chance to cancel?

A: Some will, and those were leaving anyway. The bigger effect runs the other way: surprise charges cause disputes and chargebacks, which cost more than the occasional cancellation.

Q: What does this cost?

A: Usually nothing beyond processing fees you already pay. Retry logic and pre-renewal notices are standard in Stripe and Square, and often in booking systems too.

Q: How far ahead should the notice go out?

A: Seven days is the common default. Long enough to update a card, short enough that it still feels relevant.