Maintenance agreement audit workbook

Reconcile active members by cohort and separate actual renewal behavior from new-plan sales and service obligations.

How to use this file

1. Use one row per plan and cohort over one fixed period. Count members consistently by account or agreement.
2. Count renewed agreements only among contracts eligible for renewal. Exclude mid-period additions from that denominator.
3. Earned fees and direct cost must cover the same period. Enter future visits still owed and the estimated direct cost per visit to expose outstanding service cost.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Educational planning template. Verify your figures and assumptions with your transaction advisors.

The editable register has space for 100 records. Use the same units and time period for each row.

Record worksheet

Print one sheet for each record. Use the editable workbook to calculate the derived fields across your register.

Plan / cohort _____

Opening active _____

New _____

Lost / expired _____

Closing reported _____

Count variance _____

Eligible to renew _____

Actually renewed _____

Renewal rate _____

Earned fees _____

Direct service cost _____

Program gross profit _____

Visits still owed _____

Cost per future visit _____

Future service cost _____