

Customer Performance

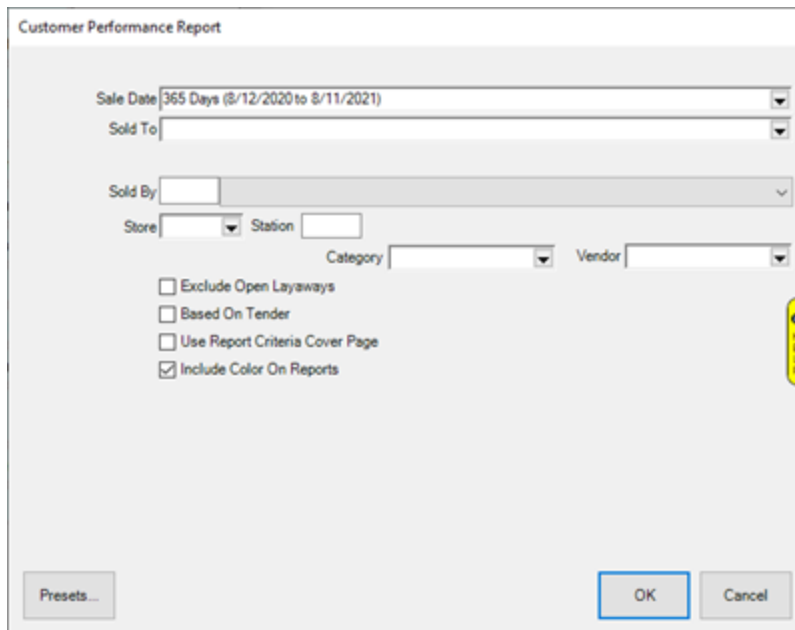
Introduction

The **Performance** report, previously known as the **Percentiles** report, shows what percent of customers make up the bulk of your sales. Typically, most stores will find that 80% of their sales come from 20% of their customers. This report helps you to identify these customers for marketing purposes.

Running the Report

To run the Customer Performance report:

1. Click **Reports > Analytics > Customers > Performance**.



The screenshot shows the 'Customer Performance Report' dialog box. It contains the following fields and options:

- Sale Date:** A date range selector set to '365 Days (8/12/2020 to 8/11/2021)'.
- Sold To:** A dropdown menu.
- Sold By:** A dropdown menu.
- Store:** A dropdown menu.
- Station:** A text input field.
- Category:** A dropdown menu.
- Vendor:** A dropdown menu.
- Options:**
 - Exclude Open Layaways
 - Based On Tender
 - Use Report Criteria Cover Page
 - Include Color On Reports

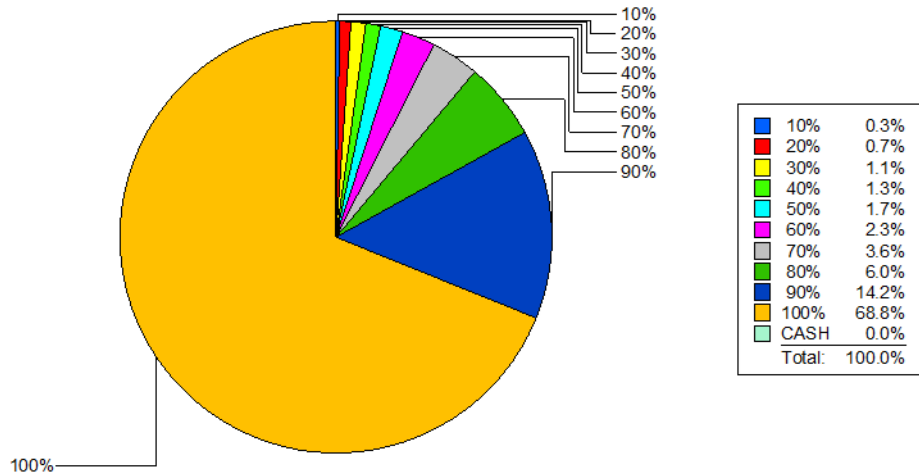
At the bottom, there are three buttons: 'Presets...', 'OK', and 'Cancel'.

2. Specify the **Sale Date** range you wish to analyze. Leave other fields blank.
3. If you do not want to include open layaways (i.e. not picked up) as sales, check the **Exclude Open Layaways** option.
4. If you want to base the calculation on total money collected instead of total sales made, check the **Based on Tender** option.
5. Click **OK** to generate the report.

See next page for information on interpreting and working with the report.

Results

Customer Performance Report



%Sales	Sales	Cumulative Sales	Customers	Cumulative Customers	Average Customer
10%	412,336.25	412,336.25	13.00	0.33	31,718.17
20%	401,113.95	813,450.20	29.00	0.73	13,831.52
30%	414,236.02	1,227,686.22	42.00	1.06	9,862.76
40%	398,701.70	1,626,387.92	51.00	1.29	7,817.68
50%	408,640.94	2,035,028.86	67.00	1.70	6,099.12
60%	404,159.61	2,439,188.47	92.00	2.33	4,393.04
70%	407,589.42	2,846,777.89	141.00	3.57	2,890.71
80%	406,309.64	3,253,087.53	237.00	6.00	1,714.39
90%	405,385.16	3,658,472.69	560.00	14.18	723.90
100%	406,387.16	4,064,859.85	2,716.00	68.79	149.63
CASH	57,571.16	4,122,431.01			

The first row of this example shows us that 10% of our total sales for the period (\$412,336) came from just 13 customers and that, on average, each of these customers spent \$31,718 at your store. To see who these customers are click on the **Cumulative Sales** number for that row.

Each row includes the numbers from all rows prior in the respective cumulative columns. The second row shows us that 20% of our total sales (\$813,450) came from 42 customers. These figures include the customers from the first row.

Depending on your purposes, you may stop here and decide to target these 42 customers for a mailing. Or, you might keep working down the list and decide to be broader and target the 202 customers that constitute 50% of your sales.

Remember, you can click on each **Cumulative Sales** number to see the underlying customers and, from this list view, you can get a print out of these customers or even create a mailing list for marketing purposes.