

Customer Analysis for A Fictional Software Company

This report has been designed to enable you to make strategic decisions about your client base. We have analysed every transaction each of your clients has made over the past 3 years to highlight the opportunities and risks present and is complete to May 2020.

Client Acquisition	The good news is that you have acquired 79 new clients in the last 12 months accounting for £220,916 or (22.1%) of your total revenue. Your newly acquired clients generated an average of £2,796 each in sales.
Client Attrition	The bad news is unfortunately 48.9% of clients from last year have not purchased anything in the last 12 months (92 of 188), this reduced your sales by £224,807. Your average revenue per new client was higher compared to your lost clients (£2,796 vs £2,444), meaning you needed 80 new clients just to stand still. Therefore, you did not acquire enough new customers to offset the revenue lost from the customers you lost.
Sales Volume and Avg Value	You recorded 4,482 transactions last year, an increase of 266 resulting in a positive impact of £63,281. Your average transaction value was £223.4, a decrease of (£14.5) per sale resulting in a negative impact of revenue impact of (£65,045).
Client Risk	In an ideal world, no single client should account for more than 10% of your turnover, this is because it represents a risk if they should fail or go elsewhere. In your case 1 client generates more than 10% of your revenue (Company 00772 (22%)), ideally you would seek to increase revenues from other/new clients to reduce this exposure.

	This Year			Last Year			YoY%		
	No.	Sales	Average Spend	No.	Sales	Average Spend	No.	Sales	Average Spend
New	79	220.9k	2.8k	98	218.0k	2.2k	(19.4%)	1.3%	25.7%
Existing	96	780.3k	8.1k	90	785.0k	8.7k	6.7%	(0.6%)	(6.8%)
Total	175	1,001.2k	5.7k	188	1,003.0k	5.3k	(6.9%)	(0.2%)	7.2%
Lost				92	224.8k	2.4k			
Retained				96	778.2k	8.1k		0.3%	0.3%
Total				188	1,003.0k	5.3k		(0.2%)	7.2%

Top 40 clients (ranked by sales value this year)

Client name	Status	TY Sales	Var to LY	Var to LY %	% Sales TY	Var to LY %	No. Transactions		Average Spend	
							TY	Var to LY	TY	Var to LY
Company 00772	Existing	219,882	89,614	69%	22.0%	9%	1,024	531	215	(50)
Company 00396	New	90,363			9.0%		187		483	
Company 00372	Existing	44,824	(12,724)	(22%)	4.5%	(1%)	209	(125)	214	42
Company 00472	Existing	42,820	9,072	27%	4.3%	1%	176	43	243	(10)
Company 00932	Existing	42,369	31,395	286%	4.2%	3%	125	42	339	207
Company 00555	Existing	37,341	(6,412)	(15%)	3.7%	(1%)	208	(63)	180	18
Company 00663	Existing	37,070	(28,968)	(44%)	3.7%	(3%)	122	(12)	304	(189)
Company 00717	Existing	22,727	4,622	26%	2.3%	0%	164	109	139	(191)
Company 00970	Existing	18,215	5,760	46%	1.8%	1%	94	76	194	(498)
Company 00841	Existing	17,935	(15,734)	(47%)	1.8%	(2%)	115	(28)	156	(79)
Company 00964	New	16,995			1.7%		1		16,995	
Company 00945	Existing	16,720	12,010	255%	1.7%	1%	33	13	507	271.2
Company 00735	Existing	15,136	10,540	229%	1.5%	1%	138	100	110	(11.3)
Company 00917	Existing	14,193	13,839	3,913%	1.4%	1%	39	36	364	246.0
Company 00915	Existing	14,160	4,969	54%	1.4%	0%	82	47	173	(89.9)
Company 00933	Existing	11,862	10,998	1,272%	1.2%	1%	27	21	439	295.3
Company 00494	Existing	11,421	8,510	292%	1.1%	1%	67	47	170	24.9
Company 00899	New	10,833			1.1%		42		258	
Company 00562	Existing	10,534	5,303	101%	1.1%	1%	84	53	125	(43.3)
Company 00462	New	10,475			1.0%		7		1,496	
Company 00626	Existing	9,896	(19,249)	(66%)	1.0%	(2%)	58	(31)	171	(156.9)
Company 00701	Existing	9,559	7,730	422%	1.0%	1%	22	12	435	251.5
Company 00729	Existing	9,350	(18,782)	(67%)	0.9%	(2%)	71	5	132	(294.6)
Company 00867	Existing	8,910	(4,777)	(35%)	0.9%	(0%)	18	(88)	495	365.9
Company 00352	Existing	8,688	8,416	3,095%	0.9%	1%	29	28	300	27.7
Company 00794	Existing	8,495	510	6%	0.8%	0%	37	6	230	(28.0)
Company 00716	Existing	7,049	(11,744)	(62%)	0.7%	(1%)	29	(47)	243	(4.2)
Company 00904	Existing	6,840	(486)	(7%)	0.7%	(0%)	30	18	228	(382.5)
Company 00916	New	6,809			0.7%		22		310	
Company 00948	Existing	6,654	3,149	90%	0.7%	0%	22	6	302	83.4
Company 00689	Existing	6,514	(420)	(6%)	0.7%	(0%)	25	8	261	(147.3)
Company 00513	Existing	6,291	(2,439)	(28%)	0.6%	(0%)	18	(23)	349	136.6
Company 00963	New	6,137			0.6%		1		6,137	
Company 00919	Existing	6,092	386	7%	0.6%	0%	16	(30)	381	256.7
Company 00830	Existing	6,044	5,363	787%	0.6%	1%	17	14	356	128.4
Company 00949	Existing	6,019	5,085	545%	0.6%	1%	31	25	194	38.5
Company 00868	Existing	5,764	1,615	39%	0.6%	0%	39	23	148	(111.5)
Company 00809	Existing	5,756	4,498	357%	0.6%	0%	22	13	262	121.8
Company 00668	Existing	5,738	2,068	56%	0.6%	0%	18	7	319	(14.9)
Company 00906	Existing	5,606	5,036	884%	0.6%	1%	7	(1)	801	729.7

Clients with the largest movement in sales value vs last year (ranked by variance to LY)

Client name	Status	TY Sales	Var to LY	Var to LY		% Sales		Var to LY		No. Transactions		Average Spend	
				%		TY	%	TY	Var to LY	TY	Var to LY		
Company 00772	Existing	219,882	89,614	69%		22.0%	9%			1,024	531	215	(50)
Company 00932	Existing	42,369	31,395	286%		4.2%	3%			125	42	339	207
Company 00917	Existing	14,193	13,839	3,913%		1.4%	1%			39	36	364	246
Company 00945	Existing	16,720	12,010	255%		1.7%	1%			33	13	507	271
Company 00933	Existing	11,862	10,998	1,272%		1.2%	1%			27	21	439	295
Company 00735	Existing	15,136	10,540	229%		1.5%	1%			138	100	110	(11)
Company 00472	Existing	42,820	9,072	27%		4.3%	1%			176	43	243	(10)
Company 00494	Existing	11,421	8,510	292%		1.1%	1%			67	47	170	25
Company 00352	Existing	8,688	8,416	3,095%		0.9%	1%			29	28	300	28
Company 00701	Existing	9,559	7,730	422%		1.0%	1%			22	12	435	252
Company 00970	Existing	18,215	5,760	46%		1.8%	1%			94	76	194	(498)
Company 00830	Existing	6,044	5,363	787%		0.6%	1%			17	14	356	128
Company 00562	Existing	10,534	5,303	101%		1.1%	1%			84	53	125	(43)
Company 00949	Existing	6,019	5,085	545%		0.6%	1%			31	25	194	39
Company 00906	Existing	5,606	5,036	884%		0.6%	1%			7	(1)	801	730
Company 00915	Existing	14,160	4,969	54%		1.4%	0%			82	47	173	(90)
Company 00717	Existing	22,727	4,622	26%		2.3%	0%			164	109	139	(191)
Company 00809	Existing	5,756	4,498	357%		0.6%	0%			22	13	262	122
Company 00948	Existing	6,654	3,149	90%		0.7%	0%			22	6	302	83
Company 00787	Existing	4,090	2,502	157%		0.4%	0%			13	8	315	(3)
Company 00835	Existing	113	(2,849)	(96%)		0.0%	(0%)			1	(3)	113	(627)
Company 00825	Existing	4,204	(3,161)	(43%)		0.4%	(0%)			22	(17)	191	2
Company 00718	Existing	2,049	(3,165)	(61%)		0.2%	(0%)			18	(14)	114	(49)
Company 00385	Existing	1,626	(3,318)	(67%)		0.2%	(0%)			7	(19)	232	42
Company 00686	Existing	597	(4,117)	(87%)		0.1%	(0%)			8	(25)	75	(68)
Company 00867	Existing	8,910	(4,777)	(35%)		0.9%	(0%)			18	(88)	495	366
Company 00773	Existing	(499)	(4,985)	(111%)		(0.0%)	(0%)			1	(12)	(499)	(844)
Company 00555	Existing	37,341	(6,412)	(15%)		3.7%	(1%)			208	(63)	180	18
Company 00614	Existing	513	(6,657)	(93%)		0.1%	(1%)			3	(20)	171	(141)
Company 00442	Existing	3,150	(9,005)	(74%)		0.3%	(1%)			24	(4)	131	(303)
Company 00449	Existing	374	(9,249)	(96%)		0.0%	(1%)			4	(69)	94	(38)
Company 00716	Existing	7,049	(11,744)	(62%)		0.7%	(1%)			29	(47)	243	(4)
Company 00372	Existing	44,824	(12,724)	(22%)		4.5%	(1%)			209	(125)	214	42
Company 00691	Existing	522	(13,997)	(96%)		0.1%	(1%)			7	(71)	75	(112)
Company 00841	Existing	17,935	(15,734)	(47%)		1.8%	(2%)			115	(28)	156	(79)
Company 00729	Existing	9,350	(18,782)	(67%)		0.9%	(2%)			71	5	132	(295)
Company 00626	Existing	9,896	(19,249)	(66%)		1.0%	(2%)			58	(31)	171	(157)
Company 00537	Existing	3,083	(24,300)	(89%)		0.3%	(2%)			16	(47)	193	(242)
Company 00530	Existing	2,816	(25,630)	(90%)		0.3%	(3%)			8	(83)	352	39
Company 00663	Existing	37,070	(28,968)	(44%)		3.7%	(3%)			122	(12)	304	(189)

Top 25 New Clients

	Sales	% Sales TY	Trans'n TY	Avg Value
Company 00396	90,363	9.0%	187	483
Company 00964	16,995	1.7%	1	16,995
Company 00899	10,833	1.1%	42	258
Company 00462	10,475	1.0%	7	1,496
Company 00916	6,809	0.7%	22	310
Company 00963	6,137	0.6%	1	6,137
Company 00601	4,778	0.5%	16	299
Company 00885	4,308	0.4%	5	862
Company 00850	4,162	0.4%	30	139
Company 00851	3,649	0.4%	26	140
Company 00905	3,353	0.3%	27	124
Company 00944	3,246	0.3%	16	203
Company 00938	3,062	0.3%	14	219
Company 00859	2,773	0.3%	32	87
Company 00966	2,660	0.3%	2	1,330
Company 00959	2,534	0.3%	25	101
Company 00925	2,527	0.3%	2	1,263
Company 00856	1,951	0.2%	9	217
Company 00943	1,680	0.2%	8	210
Company 00866	1,653	0.2%	8	207
Company 00612	1,637	0.2%	1	1,637
Company 00375	1,625	0.2%	2	813
Company 00848	1,602	0.2%	4	401
Company 00855	1,484	0.1%	2	742
Company 00965	1,449	0.1%	16	91
	191.7k	19.2%	505	0.4k

Top 25 Lost Clients

	Sales	% Sales LY	Trans'n	Avg Value
Company 00437	57,638	5.7%	46	1,253
Company 00613	22,469	2.2%	41	548
Company 00362	8,824	0.9%	15	588
Company 00838	7,643	0.8%	17	450
Company 00738	6,583	0.7%	17	387
Company 00763	5,816	0.6%	77	76
Company 00380	5,770	0.6%	14	412
Company 00801	5,552	0.6%	2	2,776
Company 00367	5,470	0.5%	21	260
Company 00731	4,566	0.5%	6	761
Company 00741	4,419	0.4%	6	736
Company 00811	3,848	0.4%	6	641
Company 00770	3,716	0.4%	3	1,239
Company 00845	3,671	0.4%	5	734
Company 00752	3,399	0.3%	6	566
Company 00826	3,391	0.3%	19	178
Company 00745	3,301	0.3%	13	254
Company 00799	3,258	0.3%	10	326
Company 00793	3,213	0.3%	25	129
Company 00377	3,210	0.3%	14	229
Company 00834	3,193	0.3%	10	319
Company 00840	3,183	0.3%	24	133
Company 00775	3,159	0.3%	27	117
Company 00791	2,470	0.2%	6	412
Company 00776	2,402	0.2%	13	185
	180.2k	18.0%	443	0.4k

Customer Trends

The charts and tables below display the sales KPIs for each of your top 5 customers over the past 3 years

