

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 2022.

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 1,034 transactions last year, a decrease of (89) resulting in a negative impact of (£79,488). Your average transaction value was £968.30, an increase of £75.17 per sale resulting in a positive revenue impact of £77,725.
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	0.0%	0.3%	0.3%
Total				188	£1,003.0k	£5.3k	(6.9%)	(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	68.8%	22.0%	9.0%	209	63	£1,052	£160
Company 00396	New	£90,363			9.0%		21	21	£4,303	
Company 00372	Existing	£44,824	(£12,724)	(22.1%)	4.5%	(1.3%)	49	(37)	£915	£246
Company 00472	Existing	£42,820	£9,072	26.9%	4.3%	0.9%	49	12	£874	(£38)
Company 00932	Existing	£42,369	£31,395	286.1%	4.2%	3.1%	40	28	£1,059	£145
Company 00555	Existing	£37,341	(£6,412)	(14.7%)	3.7%	(0.6%)	47	(27)	£794	£203
Company 00663	Existing	£37,070	(£28,968)	(43.9%)	3.7%	(2.9%)	28	(18)	£1,324	(£112)
Company 00717	Existing	£22,727	£4,622	25.5%	2.3%	0.5%	27	10	£842	(£223)
Company 00970	Existing	£18,215	£5,760	46.2%	1.8%	0.6%	27	21	£675	(£1,401)
Company 00841	Existing	£17,935	(£15,734)	(46.7%)	1.8%	(1.6%)	19	1	£944	(£927)
Company 00964	New	£16,995			1.7%		1	1	£16,995	
Company 00945	Existing	£16,720	£12,010	255.0%	1.7%	1.2%	8	(1)	£2,090	£1,567
Company 00735	Existing	£15,136	£10,540	229.3%	1.5%	1.1%	29	22	£522	(£135)
Company 00917	Existing	£14,193	£13,839	3,912.5%	1.4%	1.4%	9	8	£1,577	£1,223
Company 00915	Existing	£14,160	£4,969	54.1%	1.4%	0.5%	10	(2)	£1,416	£650
Company 00933	Existing	£11,862	£10,998	1,272.2%	1.2%	1.1%	5	4	£2,372	£1,508
Company 00494	Existing	£11,421	£8,510	292.4%	1.1%	0.9%	24	15	£476	£152
Company 00899	New	£10,833			1.1%		9	9	£1,204	
Company 00562	Existing	£10,534	£5,303	101.4%	1.1%	0.5%	14	8	£752	(£119)
Company 00462	New	£10,475			1.0%		2	2	£5,237	
Company 00626	Existing	£9,896	(£19,249)	(66.0%)	1.0%	(1.9%)	21	(14)	£471	(£361)
Company 00701	Existing	£9,559	£7,730	422.4%	1.0%	0.8%	7	4	£1,366	£756
Company 00729	Existing	£9,350	(£18,782)	(66.8%)	0.9%	(1.9%)	25	9	£374	(£1,384)
Company 00867	Existing	£8,910	(£4,777)	(34.9%)	0.9%	(0.5%)	5	(12)	£1,782	£977
Company 00352	Existing	£8,688	£8,416	3,095.2%	0.9%	0.8%	3	2	£2,896	£2,624
Company 00794	Existing	£8,495	£510	6.4%	0.8%	0.1%	19	2	£447	(£23)
Company 00716	Existing	£7,049	(£11,744)	(62.5%)	0.7%	(1.2%)	6	(17)	£1,175	£358
Company 00904	Existing	£6,840	(£486)	(6.6%)	0.7%	(0.0%)	5	2	£1,368	(£1,074)
Company 00916	New	£6,809			0.7%		2	2	£3,405	
Company 00948	Existing	£6,654	£3,149	89.8%	0.7%	0.3%	8	3	£832	£131
Company 00689	Existing	£6,514	(£420)	(6.1%)	0.7%	(0.0%)	9	4	£724	(£663)
Company 00513	Existing	£6,291	(£2,439)	(27.9%)	0.6%	(0.2%)	7	(3)	£899	£26
Company 00963	New	£6,137			0.6%		1	1	£6,137	
Company 00919	Existing	£6,092	£386	6.8%	0.6%	0.0%	2	(5)	£3,046	£2,231
Company 00830	Existing	£6,044	£5,363	787.1%	0.6%	0.5%	6	5	£1,007	£326
Company 00949	Existing	£6,019	£5,085	544.5%	0.6%	0.5%	3	1	£2,006	£1,539
Company 00868	Existing	£5,764	£1,615	38.9%	0.6%	0.2%	8	4	£720	(£317)
Company 00809	Existing	£5,756	£4,498	357.3%	0.6%	0.4%	5	4	£1,151	(£107)
Company 00668	Existing	£5,738	£2,068	56.3%	0.6%	0.2%	6	1	£956	£222
Company 00906	Existing	£5,606	£5,036	884.0%	0.6%	0.5%	2	1	£2,803	£2,233

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		No. Transactions		Average Spend	
				%	%	TY	%	TY	Var to LY	TY	Var to LY
Company 00772	Existing	£219,882	£89,614	68.8%	22.0%	9.0%	209	63	£1,052	£160	
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Company 00933	Existing	£11,862	£10,998	1,272.2%	1.2%	1.1%	5	4	£2,372	£1,508	
Company 00735	Existing	£15,136	£10,540	229.3%	1.5%	1.1%	29	22	£522	(£135)	
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Company 00562	Existing	£10,534	£5,303	101.4%	1.1%	0.5%	14	8	£752	(£119)	
Company 00949	Existing	£6,019	£5,085	544.5%	0.6%	0.5%	3	1	£2,006	£1,539	
Company 00906	Existing	£5,606	£5,036	884.0%	0.6%	0.5%	2	1	£2,803	£2,233	
Company 00915	Existing	£14,160	£4,969	54.1%	1.4%	0.5%	10	(2)	£1,416	£650	
Company 00717	Existing	£22,727	£4,622	25.5%	2.3%	0.5%	27	10	£842	(£223)	
Company 00809	Existing	£5,756	£4,498	357.3%	0.6%	0.4%	5	4	£1,151	(£107)	
Company 00948	Existing	£6,654	£3,149	89.8%	0.7%	0.3%	8	3	£832	£131	
Company 00787	Existing	£4,090	£2,502	157.5%	0.4%	0.3%	3	1	£1,363	£569	
Company 00668	Existing	£5,738	£2,068	56.3%	0.6%	0.2%	6	1	£956	£222	
Company 00695	Existing	£2,173	£1,969	965.3%	0.2%	0.2%	2	1	£1,086	£882	
Company 00651	Existing	£1,937	£1,620	510.6%	0.2%	0.2%	2	1	£968	£651	

Company 00513	Existing	£6,291	(£2,439)	(27.9%)	0.6%	(0.2%)	7	(3)	£899	£26
Company 00820	Existing	£400	(£2,460)	(86.0%)	0.0%	(0.2%)	1	(2)	£400	(£553)
Company 00835	Existing	£113	(£2,849)	(96.2%)	0.0%	(0.3%)	1	0	£113	(£2,849)
Company 00825	Existing	£4,204	(£3,161)	(42.9%)	0.4%	(0.3%)	5	3	£841	(£2,842)
Company 00718	Existing	£2,049	(£3,165)	(60.7%)	0.2%	(0.3%)	5	(7)	£410	(£25)
Company 00385	Existing	£1,626	(£3,318)	(67.1%)	0.2%	(0.3%)	3	(8)	£542	£93
Company 00686	Existing	£597	(£4,117)	(87.3%)	0.1%	(0.4%)	2	(11)	£299	(£64)
Company 00867	Existing	£8,910	(£4,777)	(34.9%)	0.9%	(0.5%)	5	(12)	£1,782	£977
Company 00773	Existing	(£499)	(£4,985)	(111.1%)	(0.0%)	(0.5%)	0	(8)		
Company 00555	Existing	£37,341	(£6,412)	(14.7%)	3.7%	(0.6%)	47	(27)	£794	£203
Company 00614	Existing	£513	(£6,657)	(92.8%)	0.1%	(0.7%)	1	(5)	£513	(£682)
Company 00442	Existing	£3,150	(£9,005)	(74.1%)	0.3%	(0.9%)	5	(3)	£630	(£889)
Company 00449	Existing	£374	(£9,249)	(96.1%)	0.0%	(0.9%)	1	(20)	£374	(£84)
Company 00716	Existing	£7,049	(£11,744)	(62.5%)	0.7%	(1.2%)	6	(17)	£1,175	£358
Company 00372	Existing	£44,824	(£12,724)	(22.1%)	4.5%	(1.3%)	49	(37)	£915	£246
Company 00691	Existing	£522	(£13,997)	(96.4%)	0.1%	(1.4%)	2	(18)	£261	(£465)
Company 00841	Existing	£17,935	(£15,734)	(46.7%)	1.8%	(1.6%)	19	1	£944	(£927)
Company 00729	Existing	£9,350	(£18,782)	(66.8%)	0.9%	(1.9%)	25	9	£374	(£1,384)
Company 00626	Existing	£9,896	(£19,249)	(66.0%)	1.0%	(1.9%)	21	(14)	£471	(£361)
Company 00537	Existing	£3,083	(£24,300)	(88.7%)	0.3%	(2.4%)	8	(15)	£385	(£805)
Company 00530	Existing	£2,816	(£25,630)	(90.1%)	0.3%	(2.6%)	2	(17)	£1,408	(£89)
Company 00663	Existing	£37,070	(£28,968)	(43.9%)	3.7%	(2.9%)	28	(18)	£1,324	(£112)

Top 25 New Clients

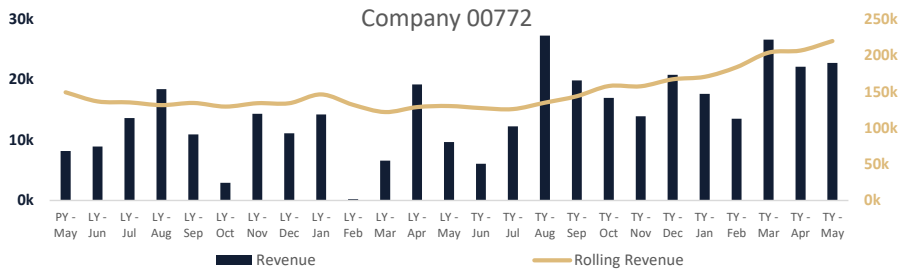
	Sales	% Sales TY	Trans'n TY	Avg Value
Company 00396	£90,363	9.0%	21	£4,303
Company 00964	£16,995	1.7%	1	£16,995
Company 00899	£10,833	1.1%	9	£1,204
Company 00462	£10,475	1.0%	2	£5,237
Company 00916	£6,809	0.7%	2	£3,405
Company 00963	£6,137	0.6%	1	£6,137
Company 00601	£4,778	0.5%	6	£796
Company 00885	£4,308	0.4%	2	£2,154
Company 00850	£4,162	0.4%	2	£2,081
Company 00851	£3,649	0.4%	4	£912
Company 00905	£3,353	0.3%	6	£559
Company 00944	£3,246	0.3%	9	£361
Company 00938	£3,062	0.3%	3	£1,021
Company 00859	£2,773	0.3%	2	£1,386
Company 00966	£2,660	0.3%	1	£2,660
Company 00959	£2,534	0.3%	2	£1,267
Company 00925	£2,527	0.3%	1	£2,527
Company 00856	£1,951	0.2%	1	£1,951
Company 00943	£1,680	0.2%	2	£840
Company 00866	£1,653	0.2%	3	£551
Company 00612	£1,637	0.2%	1	£1,637
Company 00375	£1,625	0.2%	1	£1,625
Company 00848	£1,602	0.2%	1	£1,602
Company 00855	£1,484	0.1%	1	£1,484
Company 00965	£1,449	0.1%	4	£362
Total	£191.7k	19.2%	88	£2.2k

Top 25 Lost Clients

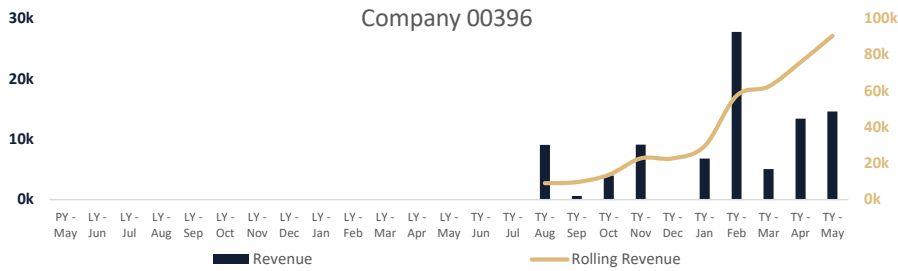
	Sales	% Sales LY	Trans'n	Avg Value
Company 00437	£57,638	5.7%	14	£4,117
Company 00613	£22,469	2.2%	8	£2,809
Company 00362	£8,824	0.9%	6	£1,471
Company 00838	£7,643	0.8%	4	£1,911
Company 00738	£6,583	0.7%	6	£1,097
Company 00763	£5,816	0.6%	8	£727
Company 00380	£5,770	0.6%	5	£1,154
Company 00801	£5,552	0.6%	2	£2,776
Company 00367	£5,470	0.5%	4	£1,368
Company 00731	£4,566	0.5%	3	£1,522
Company 00741	£4,419	0.4%	2	£2,209
Company 00811	£3,848	0.4%	2	£1,924
Company 00770	£3,716	0.4%	1	£3,716
Company 00845	£3,671	0.4%	1	£3,671
Company 00752	£3,399	0.3%	2	£1,699
Company 00826	£3,391	0.3%	2	£1,695
Company 00745	£3,301	0.3%	1	£3,301
Company 00799	£3,258	0.3%	2	£1,629
Company 00793	£3,213	0.3%	7	£459
Company 00377	£3,210	0.3%	2	£1,605
Company 00834	£3,193	0.3%	1	£3,193
Company 00840	£3,183	0.3%	4	£796
Company 00775	£3,159	0.3%	2	£1,579
Company 00791	£2,470	0.2%	2	£1,235
Company 00776	£2,402	0.2%	3	£801
Total	£180.2k	18.0%	94	£1.9k

Customer Trends

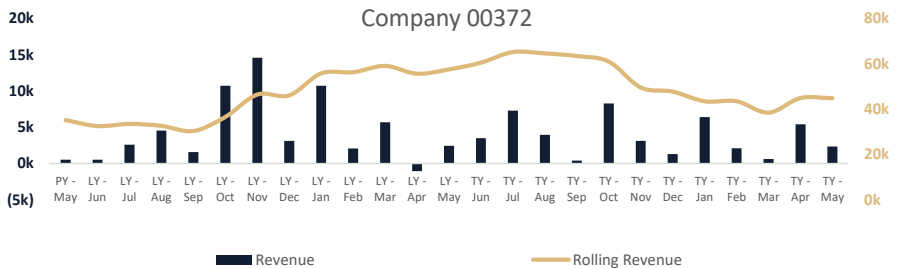
The charts and tables below display the sales KPIs for each of your top 5 customers over the past 3 years



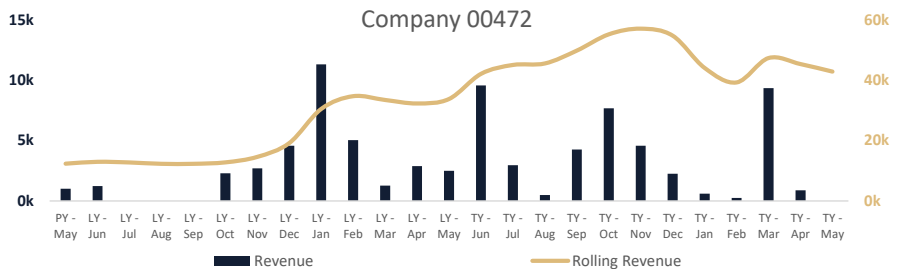
	Sales	Trans'n	Avg Value
Current Year	£219.9k	209	£1,052.06
Last Year	£130.3k	146	£892.24
Previous Year	£149.2k	157	£950.43



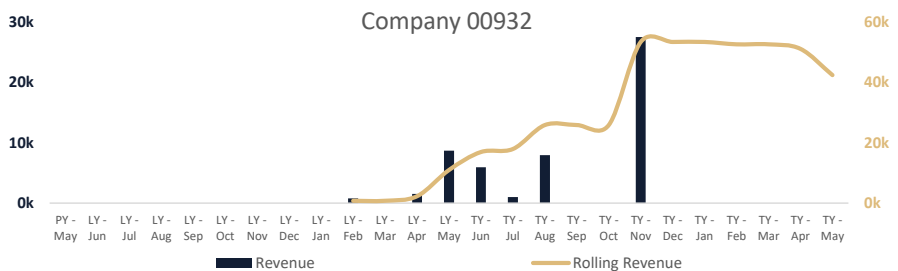
	Sales	Trans'n	Avg Value
Current Year	£90.4k	21	£4,303.02
Last Year			
Previous Year			



	Sales	Trans'n	Avg Value
Current Year	£44.8k	49	£914.77
Last Year	£57.5k	86	£669.16
Previous Year	£35.2k	62	£567.47



	Sales	Trans'n	Avg Value
Current Year	£42.8k	49	£873.87
Last Year	£33.7k	37	£912.10
Previous Year	£12.3k	17	£725.88



	Sales	Trans'n	Avg Value
Current Year	£42.4k	40	£1,059.22
Last Year	£11.0k	12	£914.47
Previous Year			

This report has been produced using data within your accounting system and is provided for information purposes only to aid decision making. No liability can be accepted for loss or unforeseen impact incurred due to actions taken as a result of the information or comments displayed within it.