VIP Customer Planner

Find the few. Treat them like it. · Customers & Retention · Episode 057

These are examples, not promises. Figures in this planner are illustrations for learning, not results you should expect. General education, not financial advice. Currency is USD.

Planned download: https://loftybiz.net/free/vip-customer-planner — this URL is not confirmed live. Systex: https://loftybiz.net

How to use this planner

1. Rank by profit. On the Profit ranking tab, list customers, twelve months of sales, and a fair estimate of costs (ingredients or labour, discounts, delivery, extra work). Profit and the top-fifth flag calculate themselves.

2. Learn the shared traits. On Shared traits, write two or three things the top group has in common: where they are, how they buy, and what they buy. This is how you find more customers like them.

3. Build the VIP programme. On VIP programme, give every top-fifth account one named contact, a check-in cadence of two to three weeks, and a quarterly review date. Next-check-in and overdue flags are formulas.

4. Keep a one-line log. Use Check-in log after every personal call or visit. Never replace a check-in with an automated message.

5. Review every quarter. Use Quarterly reviews to capture what you heard and any extra work that solves something they raised. Do not pitch first.

6. Re-run every six months. Customers move up and down. Copy the ranking, paste values into an archive, and run the list again in six months.

What this is not

This is not a promise of higher profit, and it is not about dropping everyone else. Every customer still gets your standards. Your best ones simply get more of your time. Do not give VIPs a discount as the main perk — the value is attention, priority and access. Keep the list to about the top fifth: if everyone is special, no one is.

Profit ranking (live formulas in the spreadsheet)

List each customer, twelve months of sales, and a fair estimate of costs. The sheet calculates profit (sales minus costs), share of profit, rank, and a VIP flag for the top fifth: IF(rank ≤ ROUNDUP(COUNTA × 0.2, 0), "VIP", ""). A snapshot block totals sales, profit, VIP count, VIP profit and VIP share of profit. Re-run the list every six months.

Column	What you enter or what it calculates
Customer	The account name (keep this file private).
12-month sales (USD)	Export from your accounting software.
Estimated costs (USD)	Ingredients or labour, discounts, delivery, extra work. A fair estimate is enough.
Profit / Share / Rank	Live formulas. Do not type over them.
Top fifth?	Live formula. Flags VIP automatically.

Shared traits

Write two or three things the top group shares, using three lenses: where they are, how they buy, and what they buy. Then write one profile sentence you can act on. Example only (Daniela): “Independent cafés within three kilometres that order pastries every day and pay on time.”

VIP programme, check-ins and quarterly reviews

Give every VIP one named contact and a direct line (do not publish numbers). Set a check-in cadence of 14–21 days. Next check-in is last check-in plus cadence. Status is Overdue if the next date is before today, Due soon if it falls in the next seven days, otherwise Scheduled. Next quarterly review is EDATE(last review, 3). After every personal call or visit, add one line to the check-in log. In the quarterly review, ask about their goals; offer extra work only when it solves something they have raised.

Worked examples (illustration only)

Daniela's bakery in Valletta supplied about sixty cafés, hotels and offices, with sales of around $26,000 a month. She used a simple rule: every delivery run cost about $30, and every late change about $15 of extra staff time. The twelve best customers brought about 65% of profit. The large hotel, which had the biggest orders and a 10% discount, sat in the middle of the list.

Ravi's office cleaning company in Port Louis had about forty business clients and sales of around $36,000 a month. Eight clients brought most of the profit. He built a programme of named contacts, personal check-ins every two to three weeks, quarterly reviews, handwritten cards and a short breakfast — and no discounts. Over the next year he did not lose a single one of the eight, two added new sites, and sales from the VIP group grew by about 18%. The programme cost a few hours a month and the price of a breakfast.

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Systex can hold the VIP list, the account owners, the check-ins and the reviews in one place. Find it at loftybiz.net. Keep this planner private if it holds customer names or direct lines.