

CLIENT — EXECUTIVE BRIEFING

Client Advisory Briefing

The top decile — what changed in their year

The read

Top-decile spend is stable and its composition is not. The same clients are buying fewer categories more deeply, which reads as loyalty in the total and as narrowing in the detail. Narrowing precedes attrition in every prior cohort we can read.

+1% Top-decile spend, year on year	-1.4 Categories per client	3 Prior cohorts showing the same pattern	18 mo Median lag from narrowing to lapse
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STABLE

- 01 Total spend.
- 02 Visit frequency.
- 03 Average transaction value.

NARROWING

- 01 Categories per client.
- 02 Cross-category first purchases.
- 03 New-category trial after year two.



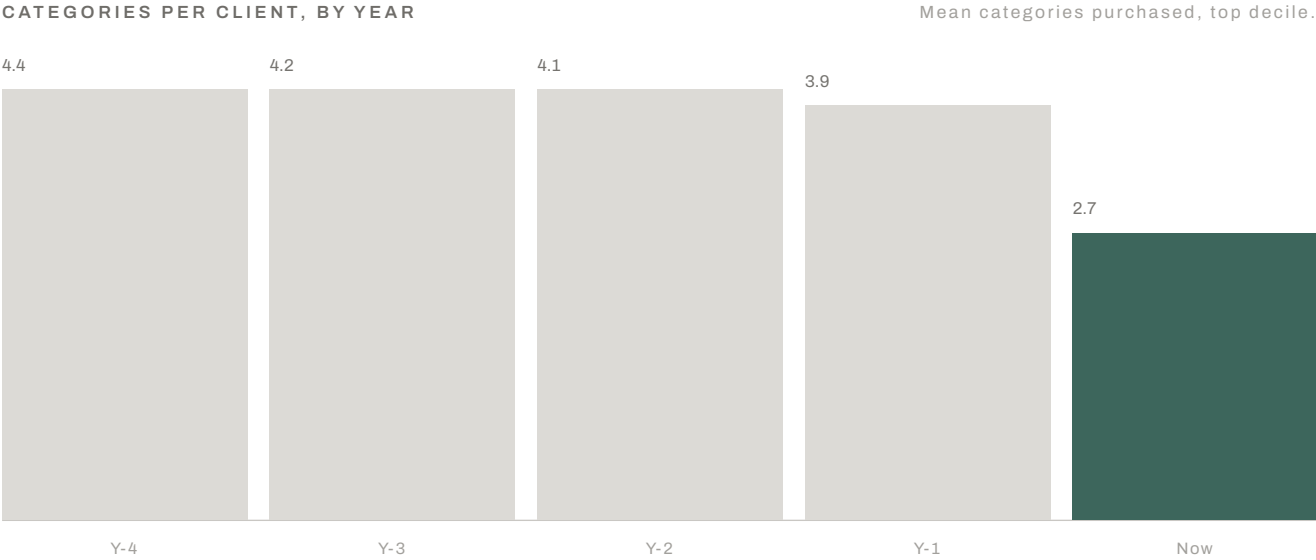
What the record holds, as it was recorded.

THE ARCHIVE · MCLEUKER HOUSE SET

SO WHAT

The total is flat and the composition is not. Reading only the total is how a cohort is lost while the report says it is healthy.

The pattern



AGAINST TOTAL SPEND			
YEAR	SPEND INDEX	CATEGORIESVISITS	READ
Y-2	98	4.1Stable	HEALTHY
Y-1	99	3.9Stable	WATCH
Now	100	2.7Stable	NARROWING

SO WHAT Spend held while breadth fell by a third. A client buying one category is one decision away from buying none, which is not true of a client buying four.



Forty minutes, and eighteen months of consequence. What a house shows is read against everything it has shown before.

MCLEUKER HOUSE SET

What to do

THE INTERVENTION

Not	A contact campaign — frequency is not the problem
Instead	Category introduction, through the advisor who already holds the relationship
Trigger	Second consecutive period in a single category
Owner	The named advisor, not central marketing
Not assessed	Whether narrowing is product-led — the range changed in the same period

SEQUENCE

NOW	Flag single-category clients to their advisor The signal exists and reaches nobody today.
+ 1 MO	Category introduction, one per client Through the relationship, not a campaign.
+ 6 MO	Re-read breadth by cohort Whether the intervention moved anything at all.

SO WHAT	The signal is already in the data and reaches nobody. Routing it to the advisor who holds the relationship is a reporting change, not a programme.
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Decisions

DECISIONS ARISING FROM THIS BRIEFING

DECISION	OWNER	BY	IF IT IS NOT TAKEN
Report breadth alongside spend for the top decile	Client Development Director	31 Jul	The total keeps hiding the composition
Flag single-category clients to their advisor	Client Development Director	31 Aug	The signal continues to reach nobody
Establish whether the range change explains it	Head of Insight	30 Sep	An intervention is built on the wrong cause
Re-read breadth by cohort in six months	Head of Insight	31 Jan	The change is not evidenced either way

SOURCES AND BASIS

Client spend and category data — our own client records, cohorts as defined internally.
Cohort lag to lapse — historical cohorts, three prior periods.
Range composition — our own assortment records over the same period.

ILLUSTRATIVE SAMPLE

This document is a rendered SAMPLE of the Client Advisory Briefing template, produced to show its structure, exhibit inventory and register. The figures in it are illustrative and are not market intelligence. A real run of this template researches and cites its figures with an as-of year for each, or marks them as modelled and states the basis — the rule the template itself carries.