Renew member analysis

Not only provide information on how many member renew after first purchase, need how long to renew, number of visits and spending amount after first purchase.

Also provide renew and not renew percentage on factors like source or member group, let company have clear picture on the strength of all factors so that marketing strategy can be made in a correct direction.

Report content

HKB2B Limited

Renew member analysis

> When select first sales date and second sales date will trigger the renew member analysis.
> Member with second sales will be treated as renew

Member group	Member code	Join shop	Source	First sales date	First sales amount	Second sales date	Renew period	Second sales amount	Total spending amount 1-May-2014 to 31-May-2014	Total spending amount 1-Jun-2014 to 30-Jun-2014	Total spending amount 1-Jul-2014 to 31-Jul-2014	Member visit count	Invoice count
Silver	WeM-10031	CTL	客人 refer	29-Jan-2014	$ 20600.00	28-Mar-2014	58	$ 2200.00	$ 5000.00	$ 6800.00	$ 11900.00	10	5
Silver	WeM-10032	CTL	客人 refer	11-Jan-2014	$ 17000.00	15-Mar-2014	63	$ 8000.00	$ 0.00	$ 5000.00	$ 0.00	6	4
Silver	WeM-10033	CTL	Walk in	9-Jan-2014	$ 9976.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	1	1
Gold	WeM-10034	CTL	Tele sales	9-Jan-2014	$ 0.00	16-Jan-2014	7	$ 18000.00	$ 0.00	$ 0.00	$ 0.00	5	2
Gold	WeM-10035	CTL	Walk in	20-Jan-2014	$ 11000.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	5	1
Gold	WeM-10036	CTL	Groupon	24-Jan-2014	$ 1800.00	28-Feb-2014	35	$ 20000.00	$ 0.00	$ 0.00	$ 0.00	4	2
Gold	WeM-10037	CTL	Walk in	19-Jan-2014	$ 19800.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	4	1
Platinum	WeM-10038	CTL	Groupon	18-Jan-2014	$ 2000.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	2	1
Platinum	WeM-10039	CTL	Groupon	2-Jan-2014	$ 3200.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	2	1
Platinum	WeM-10040	CTL	Tele sales	2-Jan-2014	$ 13176.00		0	$ 0.00	$ 0.00	$ 0.00	$ 0.00	3	1

No of Meml   10

Renew member analysis (Renew:4, Not Renew:6)

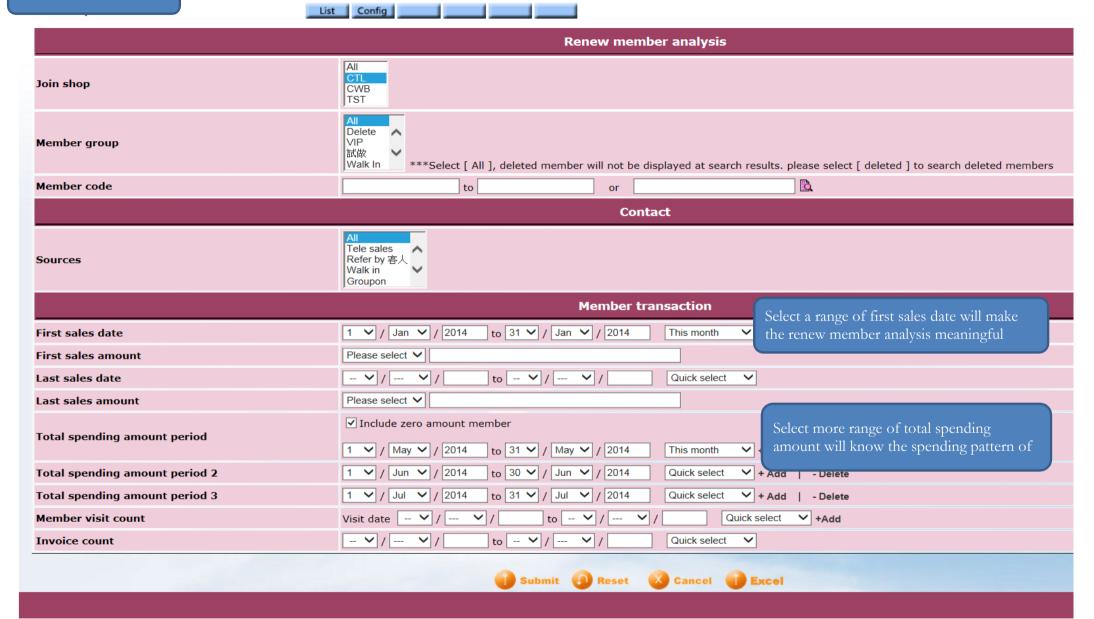| Member gro	Renew	40.00% (4/10)	**Silver 66.67% (2/3)**, **Gold 50.00% (2/4)**, Platinum 0.00% (0/3)
	NotRenew	60.00% (6/10)	**Silver 33.33% (1/3)**, **Gold 50.00% (2/4)**, <u>**Platinum 100.00% (3/3)**</u>
來源	Renew	40.00% (4/10)	Tele sales 50.00% (1/2), <u>**Refer by 客人 100.00% (2/2)**</u>, Walk In 0.00% (0/3), Groupon 33.33% (1/3)
	NotRenew	60.00% (6/10)	Tele sales 50.00% (1/2), Refer by 客人 0.00% (0/2), <u>**Walk In 100.00% (3/3)**</u>, <u>**Groupon 66.67% (2/3)**</u>

> **>50%, display in bold**
> **>70%, display in bold with single underline**
> **>90%, display in bold with double underline**

Member

English | 繁體中文

| List | Config | | | | |

Renew member analysis

Join shop

```
All
CTL
CWB
TST
```

Member group

```
All
Delete
VIP
試做
Walk In
```

***Select [All], deleted member will not be displayed at search results. please select [deleted] to search deleted members

Member code [_____] to [_____] or [_____] 🔍

Contact

Sources

```
All
Tele sales
Refer by 客人
Walk in
Groupon
```

Member transaction

First sales date	1 / Jan / 2014 to 31 / Jan / 2014	This month

Select a range of first sales date will make the renew member analysis meaningful

First sales amount	Please select	[_____]
Last sales date	-- / --- / [____] to -- / --- / [____]	Quick select
Last sales amount	Please select	[_____]

Total spending amount period
☑ Include zero amount member
1 / May / 2014 to 31 / May / 2014 — This month

Select more range of total spending amount will know the spending pattern of

Total spending amount period 2	1 / Jun / 2014 to 30 / Jun / 2014	Quick select + Add	- Delete
Total spending amount period 3	1 / Jul / 2014 to 31 / Jul / 2014	Quick select + Add	- Delete
Member visit count	Visit date -- / --- / [____] to -- / --- / [____]	Quick select +Add
Invoice count	-- / --- / [____] to -- / --- / [____]	Quick select

Submit   Reset   Cancel   Excel

Edit member report setup

Report name (English)   `Renew member analysis` ✕   Maximum 200 characters

Report name (中文)   `再次購買會員分析`   Maximum 200 characters

Allow use report user group
- All user group
- Admin
- Director_Corp
- Office_PI
- Reception_pos
- Retail_PI
- Sales_pos

> Renew member analysis will action on fields marked with (**Renew)

Column 1

Member field	Report criteria	Report content
Join shop	☑	☑
Member group (**Renew*)	☑	☑
Member code	☑	☑
Full Name	☐	☐
Last name	☐	☐
First name	☐	☐
English Name	☐	☐
Chinese Name	☐	☐
Personal Info		
HK ID Card No	☐	☐
Gender (**Renew*)	☐	☐
Date of Birth	☐	☐
Age	☐	☐
Age Group (**Renew*)	☐	☐
Occupation (**Renew*)	☐	☐
Education Level (**Renew*)	☐	☐

Column 2

Member field	Report criteria	Report content
Contact		
Home telephone	☐	☐
Office telephone	☐	☐
Mobile telephone	☐	☐
Pager	☐	☐
Fax	☐	☐
Email	☐	☐
Home address	☐	☐
Office address	☐	☐
Mailing address	☐	☐
Country (**Renew*)	☐	☐
Sources (**Renew*)	☑	☑
Membership		
Join Date	☐	☐
Discount rate	☐	☐
Consultant (**Renew*)	☐	☐
Therapist (**Renew*)	☐	☐
Prefer therapist	☐	☐
Prefer room	☐	☐
Last Consultant	☐	☐
Receive Promotion Material in	☐	☐
Heard about the company from (**Renew*)	☐	☐
Referred By	☐	☐
Referor Point	☐	☐
Remarks	☐	☐
其他意見 Other opinion (**Renew*)	☐	☐
對本中心服務的意見 What is your opinion on our service? (**Renew*)	☐	☐
美容中心專業服務? What do you think about our service? (**Renew*)	☐	☐
美容中心環境? Beauty centre environment ? (**Renew*)	☐	☐
肌膚類型 What is your skin type? (**Renew*)	☐	☐
面部潔膚系列		
從何途徑認識HKB2B? How do you know about HKB2B?	☐	☐
平均每月美容消費? Average consumption on beauty products? (**Renew*)	☐	☐
團購編號: (**Renew*)	☐	☐

Column 3

Member field — Member transaction	Report criteria	Report content
Installment outstanding amount	☐	☐
First sales date	☑	☑
First sales amount	☑	☑
First invoice analysis code (**Renew*)	☐	☐
First invoice promotion code (**Renew*)	☐	☐
Second sales date	☑	☑
Second sales amount	☑	☑
Last sales date	☐	☐
Last sales amount	☐	☐
Last visit date [Booking status=Arrived / Ready/ Finished]	☐	☐
Total spending amount [Calculate invoice amount]	☑	☑
Spending amount by product	☐	☐
Spending amount by treatment [Include treatment , flexi treatment , beauty unit , deposit]	☐	☐
Treatment value	☐	☐
Last treatment date [Booking status=Finished]	☐	☐
Outstanding amount	☐	☐
Outstanding quantity	☐	☐
Member visit count [Booking status=Arrived / Ready/ Finished]	☑	☑
Active / inactive member	☐	☐
Invoice count	☑	☑