

CLIENTELING FOR CONSIDERED PURCHASES

The Ultimate Guide to Omnichannel Retail *for High-Consideration Brands*

What clienteling is, how it works, and the technology and strategy it takes to make it pay — for brands whose sales take weeks, a conversation and somebody who remembers.

— The five-layer technology stack — A stage-by-stage playbook — A 90-day rollout plan — A 15-question scorecard

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WHO THIS GUIDE IS FOR

Founders, managing directors and heads of retail at brands where four things are true at once.

- **The order is worth a conversation** — usually four figures or more.
- **The decision takes weeks**, with research online and at least one visit in person.
- **People sell it**: associates, designers, stylists, fitters, specialists.
- **The product is configured, made to order or chosen with help** — so there's a quote, a fitting or an appointment, not just a basket.

TYPICALLY

Watches & jewellery

Bridal

Furniture & interiors

Kitchens & bathrooms

Tailoring & made-to-measure

Musical instruments

Art & galleries

With showrooms, studios or ateliers, and a website customers use to do their homework. If your customers buy on impulse and check out in two minutes, you need a quick checkout and a good email programme more than you need this guide.

The sale that slips is rarely lost on price. It is lost to a call nobody made.

INTRODUCTION

Your customer's decision doesn't have channels. *Only your sales process does.*



Ask a jeweller, a furniture maker or a tailor where their customers come from and you'll hear the same answer: *"They've been looking on our website."* The research happens online — on a phone on the sofa, over three Sunday evenings. The decision happens in the room, with a person, often after a second visit and a conversation with whoever they live with. The order arrives by quote, by phone, at the counter or, at midnight a week later, on the website again.

That is omnichannel retail, and for a high-consideration brand it isn't a strategy you choose. It is simply how your customers buy. The only question is whether your business experiences it as one relationship or as five strangers.

Most experience it as five strangers. The website knows the device but not the name. The till knows the name but not the three weeks before. The associate knows the story but keeps it in their head, or in a WhatsApp thread on their own phone. Marketing knows which campaign brought someone in and nothing about what happened next. Each part of the business is optimising its half of one customer.

This guide is about joining those halves up — and about the discipline that has always done that best in luxury and specialist retail: **clienteling**. We'll cover what it is, the technology it stands on, the strategy that makes it pay and the habits that make it stick. Where it helps, we'll show how Stitchwork does it. But most of what follows works whatever software you use, and some of it works with none.

73%

of 46,000 shoppers in one retailer's study used more than one channel. Only 7% shopped online alone, and 20% only in stores.

+23%

more repeat shopping trips to the retailer's stores within six months, from the customers who had shopped across channels.

+4% · +10%

more spent on each occasion — in store and online respectively — by those multi-channel customers than by single-channel ones.

Source: Sopadjeva, Dholakia & Benjamin, "A Study of 46,000 Shoppers Shows That Omnichannel Retailing Works", *Harvard Business Review*, January 2017. Treat any industry figure as background: the number that should drive your decisions is your own, and chapter 10 shows how to get it.

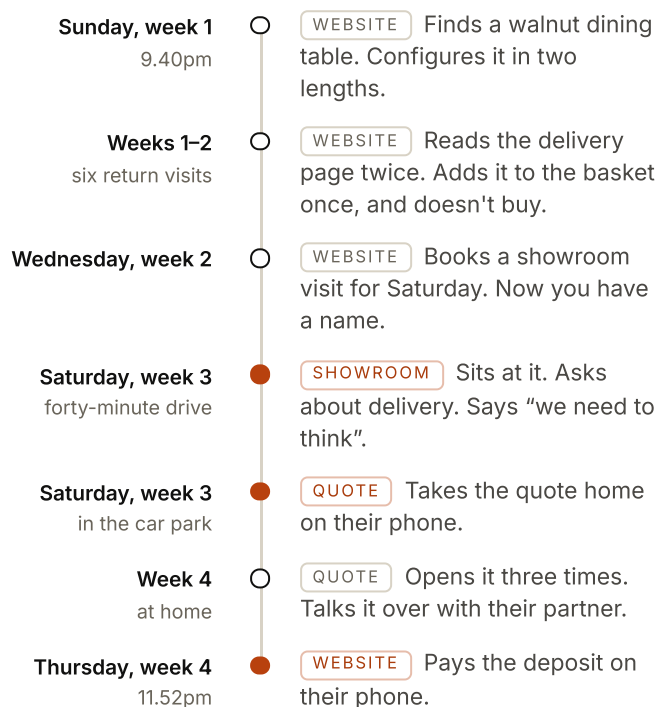
CHAPTER 01 · THE CONSIDERED PURCHASE

One customer, three weeks, *five touchpoints*.

01

Most retail software was built for a sale that happens in one sitting. Yours happens over weeks, in several places, and usually with more than one person.

HOW A WALNUT DINING TABLE GETS BOUGHT



WHAT CHANGES WHEN A SALE TAKES WEEKS

- 1 The website's job is research, not checkout.**
Judge it on the showroom orders it starts, not only on its online conversion rate — which will always look poor when your best customers buy in the room.
- 2 The decisive moment is a conversation.**
So whoever has it needs the whole story: what they looked at, what they ruled out and what they came back to twice.
- 3 The gaps are where sales are lost.**
Between the first visit and the second, between the quote and the decision. Rarely to price — usually to a call nobody made.

TWO VERSIONS OF THE SAME SATURDAY

WITHOUT CLIENTELING

The associate opens with "how can I help?" and spends ten minutes on questions the customer assumed the business could already answer. They leave saying "we need to think". Whether anybody follows up depends on who remembers. If they buy online at midnight, the floor gets no credit — so next time, the floor quietly steers customers away from the website.

WITH CLIENTELING

The associate starts in the middle: which table, which two lengths, and that delivery was the worry. The quote reaches their phone before they reach the car park. Somebody owns the follow-up, with a day it's owed by. When they pay at midnight, the sale lands on the same record, with the associate who opened the conversation named on it.

Nothing in the second version needed a better salesperson. It needed the business to remember.

CHAPTER 02 · WHERE IT SLIPS AWAY

Most of what keeps your best clients loyal *is written down nowhere.*

It is in an associate's head, a notebook under the counter and a WhatsApp thread on somebody's own phone. Here are the six places a considered sale leaks.

01

The client book leaves with the associate.

Ring sizes, birthdays, the piece they've been saving for. When someone moves on, everything they knew goes with them — and often the clients too.

02

Walk-ins leave no trace.

A name and a mobile on the back of a receipt. No email, so most systems won't take them, and the second visit starts from nothing.

03

Follow-ups live in somebody's memory.

The anniversary next month, the quote that runs out on Friday, the watch that has been ready to collect for nine days.

04

The conversation is on personal phones.

Messages nobody else can see, promises nobody else knows about, and no record of who agreed to hear from you.

05

The website and the floor never meet.

Three weeks of browsing and a basket left on Sunday night — then an associate who opens with “what brings you in today?”

06

The tools were built for mass email.

Campaign software counts opens and segments. Nothing counts whether the right person rang the right client at the right time.

Everyone is optimising their half of one customer

The leaks above are symptoms. Underneath them is an incentive problem: when the business can't see one customer across channels, each team is measured on the part it can see — and responds rationally.

The website team

Judged on online conversion, which looks poor because its best customers buy in the showroom. Budget drifts towards whatever closes in a checkout.

The floor

Measured on its own sales, so a sale that closes online counts against it. It learns to keep customers off the website — the opposite of what the brand needs.

Marketing

Can't show which campaigns filled the showroom. Its reports stop at the click, and the sales that matter most look like they came from nowhere.

THE UNDERLYING TRUTH

None of these is a people problem. Each is the rational response to a business that cannot see one customer across channels. Fix the record, and the incentives can be fixed with it.

CHAPTER 03 · WHAT CLIENTELING IS

Clienteling is *selling from memory*.

A WORKING DEFINITION

Clienteling means keeping a record of each customer — what they bought, what they're considering, what they told you last time — and using it so that every conversation picks up where the last one ended, instead of starting again.

Where the word comes from

Clienteling comes from luxury fashion, where a good sales associate kept a little black book of their best clients: sizes, anniversaries, what each one had bought, what they had said they were waiting for. When a new collection arrived, the associate rang the three people it was right for.

The book was the associate's, not the shop's. When the associate left, the clients often left with them.

Modern clienteling is that book, with three changes

- **The business owns it.** A customer isn't lost when a person moves on, and any colleague can pick up where the last one left off.
- **It's fed by more than one memory.** The till, the quotes, the appointments — and the website, which usually knows more about a customer's research than anyone on the floor.
- **It tells you when to use it.** The book never rang to say an anniversary was next week. A modern record raises the moment, on the right person's list, in good time.



The three things clienteling needs

Every setup, from a paper notebook to an enterprise system, is some version of these three. When one goes wrong, it's usually a different one from the one people blame.

1 · A record of the customer

One record per person, covering every place they meet you. If your website knows things about a customer your floor doesn't, you have half a record — and the missing half is usually where they made up their mind.

2 · A moment to use it

The record has to reach the right person when they need it: as the customer walks in, before the call, while the quote is being written. That's why clienteling lives on the tablet in an associate's hand, not a desktop in the back office.

3 · Somebody who follows through

Knowing who's worth a call is the easy half. Somebody has to make the call on a particular day and say what happened — and when the sale lands, the person who did the work has to get the credit.

What clienteling *isn't*

Clienteling gets confused with four neighbouring ideas. Each is useful, and none of them is the same thing — especially for a purchase that takes weeks.

IDEA	WHAT IT DOES	WHERE IT FALLS SHORT FOR A CONSIDERED PURCHASE
Loyalty scheme	Rewards customers for identifying themselves, usually with points or discounts.	Nobody joins a points scheme for a sofa they'll buy once a decade, and every reward comes out of margin. Loyalty is a discount; clienteling is memory.
CRM	Stores contacts, deals and activity, organised around a sales pipeline.	Built for a list of accounts, not for the moment one person walks in. Rarely sees what they did on your website, and depends on people typing things in.
Marketing automation	Sends emails and messages to segments of customers who match a rule.	Talks to a segment, not a person, and can't see who's standing in your showroom. Built for a list; your sale is a room with one person in it.
Web personalisation	Reorders your website for each visitor to lift online conversion.	Optimises a checkout that your biggest sales never go through.
Clienteling	Helps a person sell to a person, from everything the business knows about them.	Only as good as the record underneath it and the follow-through after it — which is what the rest of this guide is about.

Clienteling and omnichannel: *which comes first?*

Omnichannel describes how your customer buys: across your website, your floors, the phone and the counters you run in other people's buildings.

Clienteling is how your business responds: one person, selling to one person, from memory.

You can't do the second without a record built from the first. Point a repeat-purchase problem at the market and it answers with a clienteling app — and the demos are slick. Ask one question in them: *where does everything on that screen come from?*

The app is a window. The record behind it — web browsing joined to store purchases, joined to what the concession sold — is usually assumed. You bring your own data, and the piping is the project.

A clienteling app on top of disconnected data shows your associate a stranger. The window without the record is just a window.

When habits stop being enough

You can do a surprising amount with a shared notebook and good discipline. Habits stop being enough at three points:

- When the website does most of the early research, and none of it reaches the floor.
- When you have more than one location, and customers visit both.
- When the person who knew the customer leaves.

Those are the points where the record has to live somewhere other than people's heads.

CHAPTER 04 · THE TECHNOLOGY

The omnichannel clienteling stack: *five layers, one record.*

Most clienteling tools sell you the fourth layer and assume you already have the first three. Each layer is only as good as the one beneath it — so build from the bottom up.



↑ Build from the bottom up. A layer is only as good as the one beneath it. Layers 1–3: this chapter · Layer 4: chapters 5–9 · Layer 5: chapter 10

LAYER 1

Capture: *the record can only show what's been collected*

Your website	One script tag records page views, product views, cart adds and searches. It should follow the consent banner you already run rather than add a second one, honour Global Privacy Control, and be built so it can't break the page it's pasted on.
Your showroom	Appointments, quotes raised in the room, and codes on the shelf edge — a printed QR or an NFC tag under a plinth — that open the product on the customer's own phone and record that a visit to that showroom happened.
Your tills and checkout	Every order, online or at the counter, with the customer on it: live from your platform where it allows, by CSV or API where it doesn't. Importing the same file twice should change nothing.
Your quotes	What they were offered, when they opened it, and what they decided — accepted, declined or paid.
Your team	What they know: a ring size, an inside leg, the room a piece is for, who they buy with, what they're saving for.

LAYER 2

Identity: *storing data is easy — the joins are the hard part*

Most of your website visitors never sign in. For a considered purchase, the weeks before they give you an email are where the decision was made — so a record that starts at the email misses most of the story. There are four ways an anonymous browser becomes a person, and you want all of them.

1 · They identify on your website

A newsletter, an enquiry, a booking, a gated download, a callback request. The browsing before that moment should join their record retroactively — not start from it.

2 · They identify in the room

"Shall I send this to your phone?" is a reason customers accept. The best version takes seconds, happens on their own terms and never feels like data collection.

3 · They scan or tap a code in store

The visit lands on the same phone that probably did the research — and a QR and an NFC tag on the same label tell you which your customers actually use.

4 · Their order is matched back

An email or a mobile on the order joins an in-store purchase to their online history. A year of imported orders shows who your regulars are before you've tracked a single visit.

THE HARD CASES — DECIDE THE RULES BEFORE THEY HAPPEN

One person, many addresses. A work email to order, a personal one to browse. Future orders under either should land on one record.

Two people, one browser. The family iPad. Never silently reassign one person's browsing to another — raise it for a person to decide.

Walk-ins with only a mobile. A name and a number should be enough to make a client. Match numbers however they're typed, and join a later email when the name agrees.

Tidying up. Deleting a test quote, a duplicate or a closed store shouldn't sever a customer's history — or you'll meet them as a stranger next time.

LAYER 3

The client record: *lead with the person, not the paperwork*

The record is where capture and identity become useful. The test of a good one is simple: could any colleague open it in the time it takes to say hello, and pick up exactly where the last person left off?

Eleanor's record in Stitchwork: who looks after her, what she's spent, what's open, what the team knows and the dates that matter.

ANATOMY OF A CLIENT RECORD

1 Who looks after them

A named associate, so their follow-ups and date reminders go to someone — however long since they last met.

3 What they keep looking at

The pieces and categories from their browsing, in sequence, with searches in their own words.

5 Dates that matter

Birthdays, anniversaries (which one, given the year), and named dates like "moving in".

7 Marketing permissions

Per channel, dated, with how you know. "Not asked" is never a yes.

2 Value and what's open

What they've spent, open quotes, their next appointment, and when anyone last spoke to them.

4 What we know

One value per label — a ring size, a preferred finish, the room it's for — with who last changed it.

6 Wishlist

The pieces they have their eye on, with a note and who added it — ready for the day one comes in.

8 One timeline

Web, campaign, store visit, quote, order and identity in one stream, newest first.

Keep the sequence, not a tally

Six product views in four minutes and six spread over five weeks are different customers — one skimming, one deciding. A "x 6" can't tell you which you have. Keep the sequence and put the summary on top, not instead.

The relationship belongs to the business

Notes, messages and history live on the client's record — not on an associate's phone, and not in their head. When somebody moves on, the relationship stays.

CHAPTER 05 · THE STRATEGY

Six stages of a considered purchase, *and the move for each.*

Be useful at every stage, make it easy to be recognised, and never make a customer tell their story twice. That's the strategy. Here's what it means in practice.

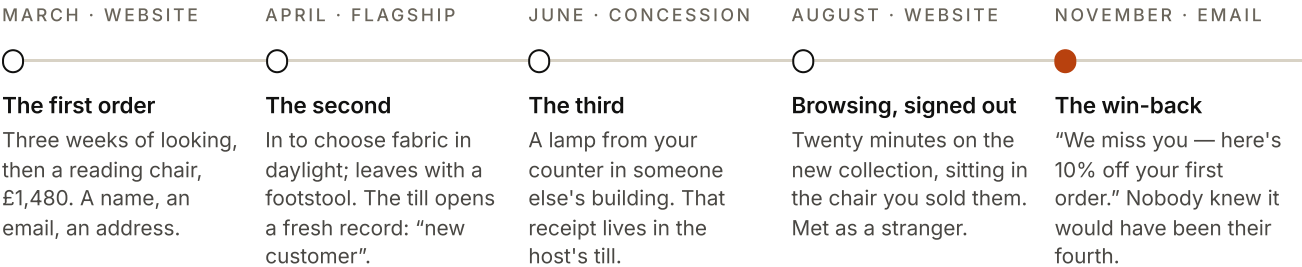
STAGE	WHAT'S HAPPENING	THE MOVE	WHAT THE TECHNOLOGY MUST DO
1 Research	Anonymous and online, often over weeks. Comparing, configuring, shortlisting.	Make research easy: dimensions, finishes, lead times, delivery and real prices where people can find them.	Record browsing behind your consent banner. Re-rank recommendations for the person looking, and lean the catalogue towards the order value you want.
2 Identify	The moment a browser becomes a person.	Give a reason that helps them: save a shortlist, book a visit, get a quote, check delivery. In the room: "shall I send this to your phone?"	Join the whole anonymous trail to the person, retroactively — from any identification, not only a purchase.
3 Consult	In the room, or on a call. The decisive conversation.	Start in the middle. Brief before booked visits. Quote in the room, and take the deposit while they're there.	Show the associate what they browsed, carted and searched; recommend for this person; build the quote live; take the deposit into your own payment account.
4 Decide	The weeks after "we need to think".	Give every open decision an owner and a date. Follow up on what they were deciding, not "any questions?". Send a personal edit.	Say when the quote is opened. Raise a follow-up before a quote lapses — and retire it if they buy first.
5 Own	Delivery, aftercare, servicing and repairs.	Ask how it's settling in, with nothing to sell. Make servicing a reason to come back in, not a paper ticket in a drawer.	Aftercare reminders after handover. Repair tickets with a status page, and "ready to collect" drafted for a person to send.
6 Return	The second purchase, and the third.	Know when each client is due, by your own shop's rhythm. Tell the right people about new arrivals. Remember the dates.	Measure time between orders from your own history. List who's due and who's lapsed. Find who should hear about a new piece — never anyone who already bought it.

The first sale pays for finding the customer. Every sale after that should be bought with memory instead of media.

STRATEGY IN DEPTH

Where the growth is: *the second purchase*

A first sale is a transaction; a second is the start of a customer. Every plan says the growth is in the second and third purchase — but a second purchase has to be *asked for*, and nobody can ask for what none of their systems can see. Watch one year of a good customer go unrecognised:



Measure your own rhythm

How long should the gap between orders be? A mattress is a decade; a candle is a fortnight. Any general rule — "lapsed after 120 days" — is a guess wearing a threshold's clothes. Measure it from your own order history instead.

Measure each step separately. The gap from first order to second is almost always the longest and least certain; by the third, customers are in a rhythm. Averaging the two gives a window too short for first-timers and too long for regulars. And with fewer than about twenty repeat buyers, don't trust the median yet.

Due is not lapsed

A client a week past their usual time is an ordinary, warm moment to be useful. A client two years quiet is a win-back. They sit on the same line, at opposite ends — never send them the same message.

Having bought is a reason to call, not a disqualification

A repeat buyer circling something new belongs on your high-intent list. Buying from you two years ago shouldn't file someone under "finished".

WHAT A DUE LIST LOOKS LIKE

Due back this week

YOUR OWN RHYTHM

E. Marsh — bought the chair in March; back on the site, circling lamps

Amara · Chelsea

DUE

T. Okafor — one order so far; a second usually comes around now

Nobody's yet — take it

DUE

S. Rowe — a regular since 2024; quiet since the spring

Amara · Chelsea · write a win-back, not a nudge

LAPSED

THREE QUESTIONS FOR YOUR OWN DATA

- 1 What share of your customers ever order a second time?
- 2 How many days does a second order normally take to come?
- 3 Who is due this week — and whose list are they on?

CHAPTER 06 · THE MOMENTS THAT MATTER

Ten reasons to be in touch, *on time.*

06

Between one purchase and the next there are moments a good associate would never miss and a busy one does. The system's job is to notice them. The associate's job is to decide what to say.

THE MOMENT	WHEN	WHOSE LIST	THE MOVE
A birthday or anniversary	A week ahead	Whoever looks after them	A personal note — and, if they've agreed to hear about pieces, the one on their wishlist.
Aftercare	A fortnight after handover	Whoever looks after them	"How is it settling in?" Nothing to sell.
A missed appointment	After the no-show	Whoever looks after them	Re-book without making them feel chased.
A quote about to lapse	Three days before	Whoever looks after them, or raised it	Answer the thing they were deciding about.
A repair ready, not collected	After a week waiting	Whoever looks after them	A reminder, and a reason to come back in.
Back on your website	Since yesterday	Whoever looks after them — or the floor, if they're nobody's yet	A light touch on what they were looking at.
A new arrival	When it lands	The associates of clients who looked, carted or quoted	"This came in and I thought of you." Never to anyone who already bought it.
Due to buy again	By your own measured rhythm	Whoever looks after them	Useful, not salesy: what goes with what they already own.
A callback request	As it arrives	Whoever has been dealing with them	Ring them. They asked.
An unanswered reply	As it arrives	Whoever has been dealing with them	Answer it before you say anything else.

Raise the reason, never the script

The system says what happened and when. The person decides what to say — that's the part the client can tell is real.

One open follow-up per client

However many signals fire, "we owe this person a call" is one obligation. Three colleagues saying the same thing in a week is how clienteling goes wrong.

Consent decides the content

A birthday note or an order update is service. News, new pieces and offers need a yes on that channel.

CHAPTER 07 · FOLLOW-THROUGH

Knowing who to call is the easy half.

Somebody has to call.

07

Most clienteling efforts don't fail on data. They fail on a list of “people to contact” that belongs to nobody, changes every time it's opened, and can never be finished.

ANATOMY OF A FOLLOW-UP

Rachel Okafor		DUE THURSDAY
OWED BY	Priya Mistry Chelsea showroom	
WHY	Quote for the walnut dresser, £4,200, lapses on Monday. Opened twice this week.	
WHY PRIYA	She raised the open quote, at Chelsea. Read off the record — never guessed.	
DRAFT	“Hi Rachel — I've held the dresser in the oak finish you asked about...” A starting point. Priya edits it and sends it, or doesn't.	
OUTCOME	“Spoke Thursday. Wants to see the oak sample in daylight — booked Saturday 11am.”	

Required to close. A “done” with nothing behind it is just a pressed button.

WHY TASK LISTS FAIL

A feed

- × Changes every time you open it
- × Belongs to nobody
- × Can't be finished
- × Nobody reviews it

A list

- ✓ Has an owner and a day
- ✓ One per client, however many signals
- ✓ Closes only with what happened
- ✓ Reviewed every week

Each associate should open *their* five, not a dashboard of two hundred. Five things done is worth more than two hundred things seen.

If they buy first, it retires itself

Nobody should open a call with “you didn't finish your order” to someone who bought last Tuesday. When the order lands, the follow-up it answered comes off the list, counted apart and paying nobody — and held to the real figure: a £30 cushion doesn't settle a £4,200 sofa.

Five rules that make follow-up stick

- 1 It lands with whoever they've been dealing with**
The associate on their open quote, at the store it was raised, or whoever looks after them — with the reason shown.
- 2 A store is sticky; a person isn't**
Somebody who leaves or moves store doesn't keep their old clients. A client on the wrong person's list *looks* handled.
- 3 Closing means writing what happened**
So six weeks later, the next person knows — and so does the manager reading the week back.
- 4 Nothing is edited, nothing reopens**
Re-dating your own follow-up until it goes away is the habit this exists to prevent. The route back is a new one.
- 5 The manager reviews the week**
Raised, done, dismissed, settled, still overdue. It is the review that makes the list get opened.

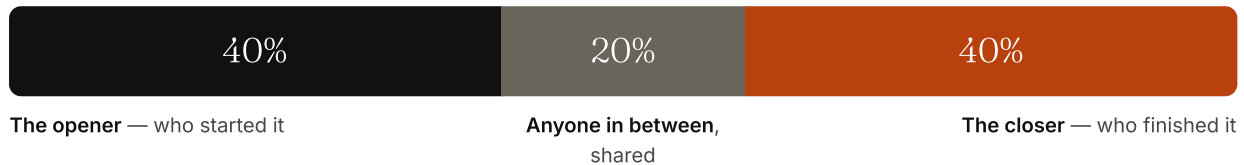
FOLLOW-THROUGH, CONTINUED

Who gets the credit — *decide before the first argument*

When a client is served by two people over three weeks and buys on their phone at midnight, somebody has to decide whose sale it was. If the person who opened the conversation isn't named when the sale closes online, the floor learns to keep customers away from the website — and your omnichannel strategy is quietly undone by your commission plan.

One rule, short enough to say to the person it pays

The split Stitchwork uses



Walnut dresser · £4,200

PAID

- Priya — raised the quote, 3 June
- Tom — held the showroom appointment, 18 June
- Priya — followed up and closed it, 2 July

Priya opened and closed: 80% · Tom in between: 20%

Two people only? A clean 50/50.

Credit attaches to the sale, never to activity

Raising a quote, holding an appointment and closing a follow-up with an outcome count. Notes and unworked follow-ups earn nothing, and revising one quote five times counts once — so it can't be farmed with busywork.

One model, frozen at the sale

Records move: quotes get deleted, appointments marked no-show, people leave. Nobody's pay should change because a colleague tidied a record.

A manager can overrule it, on the record

Somebody will eventually say "that was my sale". Let a manager set the split with a named person and a written reason, and keep the calculated split beside it.

Paid on the net, and nobody inherits a stray sale

A refund reduces every share with it. And a sale nobody touched pays nobody — it isn't handed to the nearest associate.

You're not removing the argument. You're giving it somewhere to be settled.

Stitchwork works out who earned what share of which sale, per person and per currency, with the trail behind each one. It doesn't hold your commission rates or run payroll — that stays exactly where it is.

CHAPTER 08 · MESSAGES, CONSENT AND TRUST

One person, writing to one person, *with permission you can show.*

Clienteling isn't a mailshot with a first name in it. It's a conversation — and the conversation belongs on the client's record, not on somebody's own phone.

Write from the record

Email, text and WhatsApp to one client from their page, with their reply landing back on it — so the whole team can see what was promised, and nobody says the same thing twice in a week.

- Saved replies for the messages you send every week, in the shop's own voice, with the client's name filled in — and a person reading every word.
- A reply nobody has answered goes on somebody's list.
- An address that bounced or unsubscribed is flagged before you press Send, not after.

Consent by channel, with a date

Record who agreed to hear about new pieces, on which channel, when, and how you know — told the team, a signed form, the booking page, an import. Keep it as a ledger: a correction is a new statement, never an edit.

- **"Not asked" is never a yes.**
- A STOP reply or a spam complaint is recorded the moment it arrives.
- Thank-yous, appointments and order updates are service. News and offers need a yes on that channel.

Email	Agreed	7 May 2024 · Told the team · Esme Thornbury
Text	Agreed	30 Aug 2025 · Signed a form · Esme Thornbury
WhatsApp	Not asked	
Phone calls	Not asked	
Post	Agreed	7 May 2024 · Told the team · Esme Thornbury

Marketing permissions on a client's record: per channel, with the date and how the shop knows.

A website tag that earns its place

- Follows the consent platform you already run — Cookiebot, Shopify Customer Privacy, IAB TCF v2.2 — instead of adding a second banner.
- Treats Global Privacy Control as a hard floor.
- Stores a salted hash of the IP address, never the address itself.
- Can't throw an error into the page it's pasted on.

TRUST AS A DESIGN RULE

Scope access. An associate who works in one showroom rarely needs every client in the business — and their tools shouldn't show them.

Isolate the data. Each brand's records walled off at the database itself, not just by a filter someone might forget.

Hand it over. If a client asks what you hold, give them everything in one file — and note on their history that you did.

This isn't legal advice; take that for your own situation. But a record built on these lines is one customers recognise and don't resent.

CHAPTER 09 · AI IN CLIENTELING

Let the assistant do the remembering.

Keep the judgement human.

AI is genuinely useful in clienteling, for exactly the parts that were always drudgery: preparing, finding and drafting. The danger is pointing it at customer data without rules.

WHAT IT'S GOOD FOR

"Brief me on my two o'clock."

What they're worth, what they've been looking at, the open quote, and what the team last wrote or sent them — in one answer.

"Who should I ring this week?"

The £4,000 basket left on Tuesday, the client circling the same piece for three weeks, the good customer who's gone quiet.

"Draft a note to Eleanor about the 34mm."

From what she's looked at, bought and been told — and checked against what she's agreed to hear about.

- **Careful:** James has a quote open for the Perpetual 40mm, held for the anniversary, and asked that it is not mentioned to her. Let her try it; don't say it is spoken for.

She has agreed to hear from us by email, text and post. I have drafted a short text about the crystal for you to look over.

DRAFT TEXT MESSAGE TO ELEANOR WHITCOMBE

She would rather hear it from you than find out on the night.

Hi Eleanor, a quick note before the 18th: the new crystal for your Dress 34mm is taking longer to arrive than we said. I'm chasing it and will text you the moment it's ready, and the Perpetual will be out for you on the night. Esme

Review & send

Copy

The text is waiting in the composer on her record. Nothing has been sent.

Ask Stitchwork, the assistant on every page, runs on Claude. It drafts; a person reviews and presses Send.

Five rules for AI near customer data

- 1 It sees only what the person asking can see**
An associate's AI gets their store, exactly as the app does — never the whole business.
- 3 What it suggests waits for a yes**
The assistant's proposed notes and follow-ups wait for a person's approval, and nothing any AI writes reaches a client without one.
- 5 Every connection is a named seat**
Granted by an admin to a named person or agent, and revocable on the next request. No anonymous, workspace-wide key.

- 2 It drafts; a person sends**
Nothing reaches a client until somebody has read it and pressed Send.
- 4 It can add, never change or delete**
A wrong call should leave an extra paragraph, signed by the AI that wrote it — never a lost fact.

GIVE IT A DOOR, NOT AN EXPORT

Agent proposes. Person approves. The data stays put.

Someone on your team is probably already pasting customer exports into a chatbot — every column, no audit, no off switch. The alternative is a connector: your own Claude, or any MCP client, asks a question and gets the minimum answer to it, through a door where the rules are enforced on the other side.

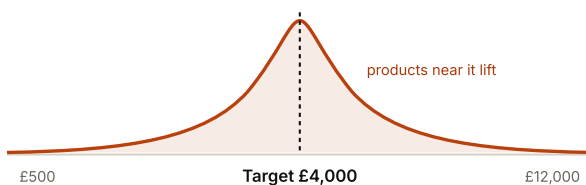
CHAPTER 10 · OPTIMISE AND MEASURE

Lean towards the number you want. *Be honest about what moved it.*

Once the record exists, two levers become available that most showroom brands have never had: steering the order value, and speaking to a visitor while they're still deciding.

Sell towards the order value you want

For a business whose economics are the average order, ranking is a commercial lever, not a widget. Rank the catalogue by signals you weight yourself — bestsellers including showroom sales, what's popular, what's carted, newness, what you feature — and add a **target average order value**. Products near it rise everywhere at once: the website's recommendations, the category pages, and the list in your associate's hand.



- A curve, not a cut-off — nothing disappears for being off-target.
- Feature a piece and it still lifts. Your merchandising beats the algorithm.
- No black box: every product's score broken down signal by signal.

Speak while they're deciding — *with a control group*

Show one line on your own site to a visitor whose browsing matched a rule you wrote — the person who's been round the same four beds for twenty minutes. Offer a callback, and it lands on a colleague's list.

Any tool can show a banner to interested people and take the credit when they buy; interested people were always the likeliest buyers. So **hold a share of the matches back and show them nothing**. The difference between the two groups is the only honest number.



Shown the message — 90% of matching visitors

Held back

Better

It earned its place.

Worse

Switch it off.

Inconclusive

And how many more visitors would settle it.

Counting

Under 30 in a group: no verdict yet.

Don't guess what "interested" means

How many product views makes someone interested? Nobody knows on day one. Read what your own buyers did *before* they bought and set the thresholds from that — and if you have fewer than twenty-five buyers to learn from, say so and use sensible defaults.

A message that can't beat its own holdout is one to switch off — and the report has to be able to say so.

OPTIMISE AND MEASURE, CONTINUED

Attribution that counts *the showroom*

Your marketing reports probably stop at the click. For a considered purchase, that misses most of the sales: the ones that closed in the room, on a quote or over the phone, weeks after the campaign that started them.

Once every campaign arrival lands on the customer's record — next to their store visits, quotes and orders — you can split each sale's credit across the campaigns that came before it, *wherever it closed*.

- **Compare models side by side.** First touch, last touch, linear, time decay, position-based. A campaign that leads under all five is one to back.
- **Count the unattributed.** Walk-ins and regulars no campaign touched are sales too. Show them; don't drop them.
- **Never add currencies together.** Report pounds, euros and dollars side by side.

AN HONEST LIMIT

Attribution tells you which campaigns preceded which sales. It can't tell you the return on your ad spend unless it knows what you spent.

Stitchwork reads campaign arrivals back as credited sales. It doesn't connect to your ad accounts or hold your spend, so it reports no ROAS — and says so, rather than showing a figure it can't back.

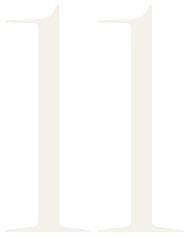
Ten numbers worth watching

Once online and in-store activity share a record, these tell you how omnichannel your business really is — and whether your clienteling is working. All of them should come from your own data, not an industry benchmark.

- | | |
|--|---|
| <p>01 Showroom orders from customers who browsed first
The headline number, and usually a surprise.</p> | <p>02 Days from first website visit to order
Your real sales cycle — it sets how long follow-ups and attribution should run.</p> |
| <p>03 Repeat rate
The share of customers who ever order a second time.</p> | <p>04 Days from first order to second
Measured from your own history, step by step.</p> |
| <p>05 Quote win rate, and how often quotes are opened
A quote opened three times is a different conversation.</p> | <p>06 Average order value against your target
Is the ranking leaning where you asked it to?</p> |
| <p>07 Follow-ups raised, done, dismissed and settled
Every week, per person. The review that makes the list work.</p> | <p>08 Store visits by showroom and by code
Footfall tied to people, not a door counter — scans and taps counted apart.</p> |
| <p>09 Credited sales per campaign, and unattributed
Including the ones that closed in the room.</p> | <p>10 Message verdicts against their holdouts
Better, worse, inconclusive or still counting — quoted as given.</p> |

CHAPTER 11 · HOW STITCHWORK PUTS IT TOGETHER

One record of each client. *A team that knows what to do next.*



Stitchwork is clienteling software for luxury and high-consideration brands — jewellers, watch shops, showrooms and tailors among them. It starts with the part most tools assume you already have — the record — and puts the screens your team sells from on top of it.

LAYER	IN STITCHWORK
1 · Capture	One script tag on your website, behind your own consent banner. Shopify and Shopify POS connected directly, with every order on the client's record as it happens; other tills by CSV or the API. QR and NFC codes for every showroom. Quotes, appointments and repairs recorded where they happen.
2 · Identity	Browsing joins a client retroactively when they identify — from a newsletter, an enquiry, a booking, a quote or in the room. Walk-ins by name and mobile. One person, many addresses. A browser that identifies as two people raises a question rather than guessing. Merges with an audit trail.
3 · The record	Who looks after them, tags, what the team knows, the dates that matter, a wishlist, marketing permissions as a dated ledger, every message both ways — and one timeline of web, campaign, store, quote and order.
4 · Action	Today, each associate's morning list. Follow-ups with an owner, a day and an outcome. Email, text and WhatsApp from the record. Lookbooks, quotes and deposits into your own Stripe account, repairs with a status page — and Ask Stitchwork, the assistant on every page, on Claude.
5 · Proof	Sales credit per person with the trail behind each share. The weekly review. Order-value ranking, campaign attribution with five models, and on-site nudges with a held-back control group — the optimisation tools on Collection.

Ring these first

4 people typed a number into the site and asked to be rung — the longest has waited 6 days. [Open the queue.](#)

Yusuf Lindqvist

Two years since the last one, and nothing since. Worth a call.

2 days overdue · Mayfair boutique

Log outcome

Eleanor Whitcombe

Birthday on Sat 10 Oct — in 6 days.

Today · Mayfair boutique

Log outcome

Priya Natarajan

Quote Q-2026-0009 (£6,850.00) lapses on Tue 6 Oct and has not been answered.

Today · Mayfair boutique

Log outcome

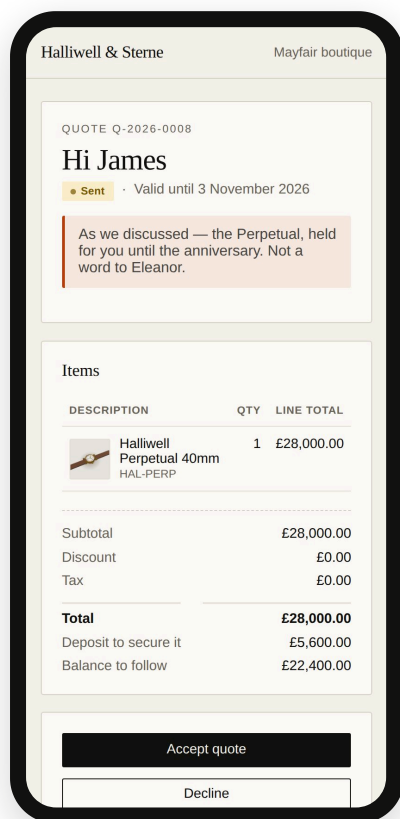
Today: who to contact, and why

Each associate's morning: who asked to be rung, what's overdue, whose dates are coming up, which quotes are about to lapse, who's walking in, and who came back to the website since yesterday.

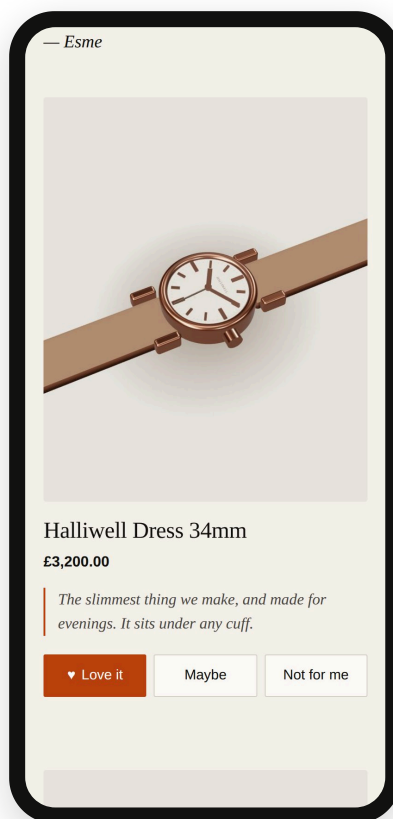
HOW STITCHWORK PUTS IT TOGETHER, CONTINUED

What the client sees: *no app, no login, nothing to install*

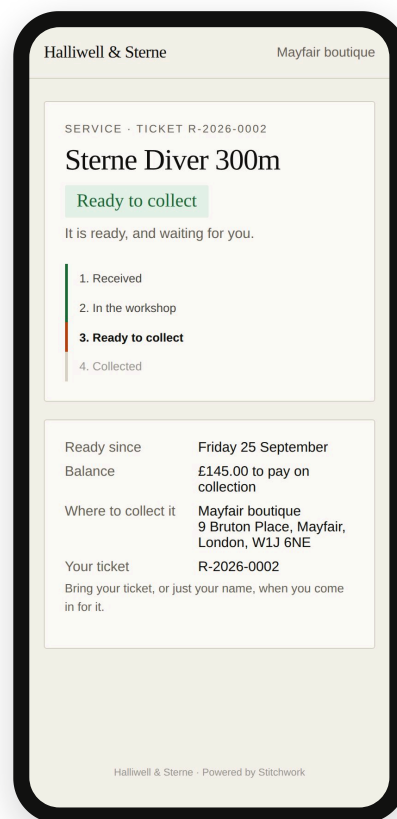
Three of the moments in this guide reach the client directly, as a page with your shop's name on it that opens on any phone. Each one answers back onto their record.

**Quote at the counter, deposit before they leave**

Built with the client in front of you and sent to their phone. They accept and pay the deposit by card in the room or later from the link; the balance follows when the piece is ready.

**A personal edit, and an answer**

A few pieces with a line about why. They tap Love it, Maybe or Not for me; you're told when they open it, and what they love joins their wishlist.

**A repair they can follow**

A printed ticket with a QR code to their own status page. When it's ready, "ready to collect" is drafted for a person to send.

People send. The assistant prepares.

Nothing reaches a client until a person has read it and pressed Send. The assistant briefs, finds and drafts; it can't change or delete a thing.

It won't break your website.

One script that can't throw into your page, your consent banner rather than a second one, and Global Privacy Control always wins.

Consent you can show.

Every yes and every no, by channel, with the date and how you know. A STOP reply is recorded the moment it arrives.

Set up in an afternoon.

Your catalogue, last year's orders and the tag — then the record starts assembling from the customers you already have.

CHAPTER 12 · YOUR FIRST 90 DAYS

From a notebook to a business that remembers, *in a quarter.*

12

Technology first, then habits, then relationships, then optimisation. Skip a stage and the next one won't hold.



WEEK 1

Build the record

- Day 1: the catalogue in, with a picture for every piece.
- Day 2: last year's orders — or connect Shopify and bring the history in.
- Day 3: the tag live on your website, behind your consent banner.
- Bring in the client list you already keep; preview it first.
- Set up each showroom, invite the team, connect texting.

Your regulars visible before you've tracked a single visit.

DAYS 8–30

Build the habits

- Every associate opens Today each morning.
- Every walk-in leaves with a name and a mobile on file.
- Ask about marketing permission at the counter — and record the answer.
- Quote in the room; take the deposit before they leave.
- Write saved replies in the shop's own voice.

No “we need to think” without a name and a day.

DAYS 31–60

Build the relationships

- Give every good client someone who looks after them.
- Add the dates that matter, and what the team knows.
- Send your first lookbooks from clients' wishlists.
- Run every repair and service through a ticket.
- Announce the credit rules, then start the Monday review.

A follow-up list that's the team's own — and gets finished.

DAYS 61–90

Optimise

- Set a target average order and watch the ranking lean.
- Run a first nudge with a holdout — and believe its verdict.
- Read campaign credit, showroom sales included.
- Measure your repeat rhythm and work the due list.
- Connect your own AI under named seats, if you want it.

You can say what's working, and who earned it.

THE SCORECARD

How joined-up is your clienteling? *Fifteen questions.*

Pick a real client who has bought from you twice, through different channels. Tick each question you can answer “yes” to today — for them, not in theory.

THE RECORD

- ☐ 01 Can you see both of their orders on one record — online and in store?
- ☐ 02 Can you see what they browsed before they gave you an email?
- ☐ 03 Can you see which of your stores they visited, and who served them?
- ☐ 04 Could a walk-in with only a mobile number become a client in under a minute?
- ☐ 05 If their associate left tomorrow, would everything they knew stay with the business?

THE MOMENTS

- ☐ 06 Will somebody hear, a week ahead, that this client's anniversary is coming?
- ☐ 07 Does a quote about to lapse put the client on someone's list?
- ☐ 08 When a new piece lands, can you list who should hear — and leave out who already bought it?

THE FOLLOW-THROUGH

- ☐ 09 Does every “we need to think” have a named person and a date?
- ☐ 10 Does closing a follow-up require writing what happened?
- ☐ 11 When a client buys online after a showroom visit, is the associate named on the sale?
- ☐ 12 Could an associate see all of the above on a tablet in the time it takes to say hello?

TRUST AND PROOF

- ☐ 13 Can you show, per channel, who agreed to hear from you — and when?
- ☐ 14 Are client messages on the client's record, not on personal phones?
- ☐ 15 Could you say whether your last website message changed anything, against a control group?

0–5

Selling from people's memories

The relationships are real, but they live in heads and on phones. Start with the record — chapter 4.

6–10

Joined up in places

You have much of the data. The moments and the follow-through are where sales slip — chapters 6 and 7.

11–15

A business that remembers

Now prove it, and lean towards the order value you want — chapter 10.

Want a second opinion on your score?

Book a twenty-minute walkthrough and we'll go through your answers on your own catalogue — or start the free trial and watch the “no”s turn into “yes”es.

[stitchwork.io/meet →](https://stitchwork.io/meet)



YOUR NEXT STEP

See it on *your own shop.*

Stitchwork keeps one record of each client — what they love, what they own, what they looked at online, who looks after them — and gives your team a short list each morning of who to contact and why.

TRY IT YOURSELF

Start the free trial

Seven days on Collection with every feature switched on, no card. Set up in an afternoon.

app.stitchwork.io/signup →

OR LET US SHOW YOU

Book a walkthrough

Twenty minutes, on your own catalogue.

stitchwork.io/meet



INDEPENDENT

£400 a month

One showroom, three people, 2,000 assistant credits a month.

COLLECTION

£850 a month

Three showrooms, six people. Two showrooms and eight people: £1,000.

GROUP

£2,500 a month, from

Ten showrooms or more, on terms agreed with us.

Order-value ranking, attribution and nudges on every plan. £75 a month for each further colleague; £15 for each AI connection. A £1,250 launch package to start, included with two months free when paid yearly. Deposits into your own Stripe account: 0.5% or 0.3%, capped at £15. Texts on your own Twilio account, no margin.