



MANAGERS MEETING · CLIENTELING

Beyond the Blast

Building a Repeatable Clientele Practice

Clienteling isn't marketing. It's the deliberate work of maximizing the ~100 real relationships each associate can hold — and the lifetime value inside them.



Understanding Comes First

You can't teach — or do — what you can't clearly define. Before the tactics, get the concept sound. The better you define what clienteling actually is, the better you'll do it.

“The concepts and the principles you operate on have to be sound to really do something.”

THE GOLF LESSON

A player kept missing right, so he aimed his feet further left. But feet don't send the ball — the club face does. Aiming the body just opened the face and made the miss worse.

Fix the concept, not the symptom. Same with clienteling: the wrong mental model produces a lot of motion and little return.

What Clienteling Actually Is

Ask most people what clienteling means and you'll hear a list of outputs. But the activity isn't the point — the outcome is.

WHAT IT ISN'T

- ◆ Thank-you notes as a checkbox
- ◆ Email blasts to the whole list
- ◆ Mass text blasts
- ◆ Blanket outreach that just asks for money

WHAT IT IS

- ◆ A strategic play on lifetime value
- ◆ Real, personalized relationships
- ◆ Raising average ticket + frequency
- ◆ Relationship work — not marketing

Why Existing Clients Win

An existing customer is worth substantially more — around five times more in revenue and margin than a new one.

5x

the value of a new customer

◆ Existing clients

Higher average ticket, higher margin, and they close faster.

◆ New / bridal clients

Harder to win, take longer to close, spend less at lower margin.

◆ THE STAKES

You Can't Live on One-Offs

Jewelry lifetime value is unlike most businesses. If people shop once and never return, an independent won't survive — because for a mature store, the vast majority of revenue comes back through the door with people you already know.

So the whole game is getting existing clients back in — again and again.

80%+

of a mature store's revenue comes from
existing clients

People Come Back for a Person

A large share of why people buy jewelry is the person and the relationship they buy it through. For repeat buyers, it's like having a trusted liaison at the store.

The customer's loyalty isn't to the company — it's to the relationship.

A REAL EXAMPLE

A friend at a high-end clothing store keeps a client buying 5–7 times a year — while that client walks in maybe once every two or three years.

He knows the taste, tracks new inventory, sends the right pieces, and makes buying effortless. The relationship does the selling.



THE SCIENCE · DUNBAR'S NUMBER

Your brain can hold about 100 relationships.

Family, friends, coworkers — roughly 100 people you truly keep up with: their names, their kids, what they do. It's a hard cognitive cap, and it's exactly why clienteling has to be deliberate.

Even highly social people land near the same number — they just have more to choose from.

◆ HOW IT MAPS TO SELLING

Every Associate Runs a Pod

Great salespeople carry about the same limit. An associate's book is really a pod of 60–80 core clients who shop with them often — and that pod produces almost all of their business.

Think of it as 100 pegs in a board. The relationships — texting, knowing their dog, staying in touch — are what fill the holes.

~100

relationships an associate can actively hold

60–80

core clients in the pod that shop often

Most

of their revenue comes from that pod

◆ THE HIDDEN LEAK

The Clients You've Lost

Run the report almost no one runs: high spenders who haven't come back. On a big list, the number is startling — real revenue sitting unworked.

\$65K

SPENT · NO VISIT IN 3 YRS

\$50K

SPENT · NO VISIT IN 3 YRS

\$40K

SPENT · NO VISIT IN 3 YRS

WHY THEY VANISHED — AND WHY THEY'RE SAVABLE

- ◆ A big purchase happened — and no one ever followed up again.
- ◆ Something went unaddressed: a fit issue, or a piece they never wore.
- ◆ Someone who spent that much doesn't just stop — if you stay in touch, they come back.

Give Them Better Pegs

Associates naturally pick up ~100 people on their own — mostly whoever stays top of mind. Your job is to feed them better ones.

RUN THE LISTS

Generate reports of lapsed high-spenders and hand them to associates. Every good peg you place raises average ticket — because you're upgrading the 100 spots they can hold.

NEW SELLERS vs. TOP SELLERS

New sellers



At Christmas they wait on 2–3× more people — lots of small transactions.

Top sellers



Fewer people, more time with higher buyers — that's where the dollars are.

The play



Direct the pods: keep big spenders top of mind so associates follow up first.

Six-Month Cleaning Checks

The single best outreach isn't a pitch — it's service. Follow up on jewelry you've already sold: invite them in to clean and check it, and ask how they're wearing it.

You promised it on the front end — so it's welcome, not intrusive.

WHY IT WORKS

- ◆ The best bucket for catching service issues — before they cost you the client.
- ◆ Easiest outreach to train and the lowest barrier for associates to make.
- ◆ Works for repairs too: follow up six months after a repair is done.
- ◆ It's hard to build a relationship if every touch is an ask.

◆ SAME LIST, TWO ASKS

Which One Actually Happens?

Give two associates the same client list. Ask one to sell, ask the other to serve. Watch what happens.

“CALL THEM TO LOOK AT DIAMONDS SATURDAY”

- ◆ Feels like a cold ask
- ◆ Associates avoid making the call
- ◆ Lower response, more fatigue
- ◆ Nothing learned about the client

“JUST MAKE SURE THEIR JEWELRY IS CLEAN”

- ◆ Easy, welcome reason to reach out
- ◆ Associates actually do it
- ◆ Client comes in — and often buys
- ◆ You learn what they wear & love

The service call gets the most people in — and the person making it already knows the jewelry before the client walks through the door.



THE PRINCIPLE OF THE ASK

“The longer the runway, the bigger the plane can take off.”

Every blind ask takes something from the client — call to sell once, and the next call gets harder. But build rapport first — send the right picture, ask how they're doing — and the fifth touch outperforms the first. Whatever you give in a relationship, you get back.

◆ AVOID THIS

What Hurts Your Associates

Not all outreach is equal. The blast channels erode trust and opt-outs; personalized email quietly outperforms.

MASS TEXT

- ◆ Among the worst channels
- ◆ Opt-out language is sensitive
- ◆ Reads as spam, not a relationship
- ◆ Burns trust with every blast

PERSONALIZED EMAIL

- ◆ Consistently more successful
- ◆ Easy to personalize “from you”
- ◆ You can send more, and it lands better
- ◆ Beats text for real outreach

Fill the Pods Faster

It takes about two years for an associate to build a real book. Turnover and neglect quietly drain those clients away. The fastest fix: simple, no-pressure introductory outreach.

Give them better pegs for the 100 spots, and they build relationships — and sell — far faster.

THE INTRO TEXT

“Hi, I’m [name] with [your store]. I saw you made a purchase about a year ago — hope you’re still loving it! If it ever needs cleaning, checking, or an appraisal, reach out to me anytime.”

Then teach them to pick up the service — and each of those 100 spots fills faster than any other method.

The Clienteling Playbook

◆ It's a lifetime-value strategy

Not marketing, not blasts — the deliberate work of raising average ticket and frequency.

◆ Respect the 100

Associates hold ~100 active relationships. Make sure the best pegs are your best spenders.

◆ Lead with service

Six-month cleaning checks and follow-ups are the easiest, stickiest, most trainable outreach.

◆ Build the runway

Give before you ask. Rapport first — the later, warmer touch always outperforms the cold one.

◆ Personalize everything

Model your tenured associates, feed lists to new ones, and keep every touch human.

◆ Work the lost list

Lapsed high-spenders are savable revenue — find them and hand them over.



Built for This, by Jewelry Sales Academy

Clienteling isn't a mass-marketing tool — it's a relationship system. That's what we build.

◆ Clienteling lists & CRM

◆ Onboarding & training

◆ Messaging & web chat

◆ Google reviews

◆ Email integrations

◆ Reporting & lost-client lists

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