



The Ultimate Guide to Retail Clienteling

Five retail journeys to convert more customers, increase footfall, and encourage repeat visits.



Letter from Leigh Sevin, Co-Founder & CEO of Endear

At Endear, we have the privilege of working with some of the most innovative and customer-focused retail brands in the world.

When these brands approach us, they all face the same fundamental challenges:

"How do we retain more first-time customers?"

"How do we identify VIPs and create a genuinely exclusive experience?"

"How do we drive more footfall to our stores?"

If you're asking these questions, you're certainly not alone. These are the exact challenges we hear about most, which means we've identified proven methods to solve them.

At Endear, we get a front-row seat to what's actually working for brands like Reformation, GANNI, Strathberry, and ANINE BING. They thrive by systematically guiding their customers from first-time buyers to repeat purchasers to loyal VIPs (what we call *customer journeys*).

Inside, you'll learn core journeys we help brands build:

- How to get that second purchase (arguably the most important one)
- What it takes to convert local online shoppers into in-store visitors
- How to identify and elevate casual shoppers into brand superfans
- How to recognise your VIPs and deliver exceptional experiences
- And finally, how to keep your customers engaged not just for months, but for years

This isn't just theory. It's actionable guidance for retail teams who want to grow strategically, strengthen customer relationships, and achieve substantial ROI from their clienteling.

We hope you find this guide valuable and welcome your feedback. And don't hesitate to reach out with any questions or comments you may have! I'd love to hear from you.

Leigh Sevin

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Overview of the Customer Journey

Let's dive into the five customer journeys retail brands want to optimise the most:

Turn First-Time Shoppers into Repeat Customers

Get Local Online-Only Shoppers to Visit In-Store

Identify VIPs and Provide an Exclusive Experience

Convert Casual Shoppers into Brand Advocates

Keep Customers Engaged for the Long-Term



Turn First-Time Shoppers into Repeat Customers

The Critical 90-Day Window That Makes or Breaks that Second Purchase

What's that notification from your CRM? A new customer just made their very first purchase at your store! Great! But now comes the real work.

Welcome to the never-ending quest of retail success: capturing the hearts, wallets, and —the focus of this chapter—repeat visits from your soon-to-be loyal customers. While getting that first-time purchase is an achievement, the real journey for both your brand and the customer is just beginning.

Here's why this matters: Research shows that while the likelihood of second purchase is only 27%, it jumps to 49% after the second purchase (and 62% after the third). Think of it like the "gateway purchase" - that second buy cements loyalty and kickstarts a long-term relationship.

The key factor? You only have a 90-day window to get them to make a second purchase. After that, it becomes considerably more difficult to convert a one-time shopper.

The second purchase is your chance to transform a transaction into a relationship. Once a customer makes their second purchase, they're far more likely to continue shopping for the third, fourth, and five hundredth time afterward.

Unfortunately, you can't just hope they'll magically show up again. Instead, your team needs a strategy that's informative, personal, and built around building genuine customer relationships.



Step 1: Collect Contact Information From Day One

For savvy sales teams, the groundwork for a second purchase starts with the first transaction. But remember, collecting complete contact information must be done properly under GDPR data protection laws.

When a customer makes that initial purchase, obtaining their name, email, address, and phone number requires clear, informed consent. Your shop assistants should be trained to approach this transparently:

"I'd love to keep you updated with personalised style recommendations and let you know about new arrivals that match your preferences. Would you like me to take your contact details for this?"

Why this matters:

- **Outreach is impossible without being able to reach them**
- **Having their data enables personalised follow-up that shows you remember them**
- **Establishes proper legal consent for outreach under GDPR requirements**

Using a GDPR-compliant CRM like Endear ensures all customer communications are properly managed with built-in consent tracking and easy opt-out options. This is far superior to shop assistants reaching out from personal numbers, which offers no tracking, compliance oversight, or customer control over their preferences.



Step 2: Get Their Phone Number for Direct Communication

Email is great, but getting their mobile number? Even better. When you can establish a texting relationship with the shopper, your brand has a considerably better chance of earning that second purchase.

Why this matters:

- **SMS and WhatsApp open rates are significantly higher than email**
- **People see texts within minutes of receiving them**
- **Allows for more personal, direct communication**
- **Creates immediate connection in our phone-centric world**

Just remember: with great phone numbers comes great responsibility. Be respectful of your customers' trust. Don't spam them, and don't blow up their phone with mindless marketing. Keep it relevant, helpful, and entertaining, and they'll appreciate that you're reaching out to them in a personal way.





Step 3: Create Human Connection From the Start

People connect with people, not faceless corporations. If your brand can infuse that human touch from day one, you'll create an experience customers want to replicate.

Think about how you feel when you walk into a neighbourhood café and the barista says, “Hey, the usual?” or when you hear your name called out in a store by a friendly assistant—instant warmth. The stronger that first connection, the more likely they will be to make a second purchase.

What this looks like:

- **Include handwritten notes in packages**
- **Send personalised thank-you emails or text messages**
- **Train staff to take note of interactions in your CRM to reference later**
- **Follow up with personal messages and check-ins about their purchase**

Step 4: Make Sure Their First Time Was a Great Time

First impressions extend beyond the initial transaction. The first month of ownership is prime time to win someone's heart.

What this looks like:

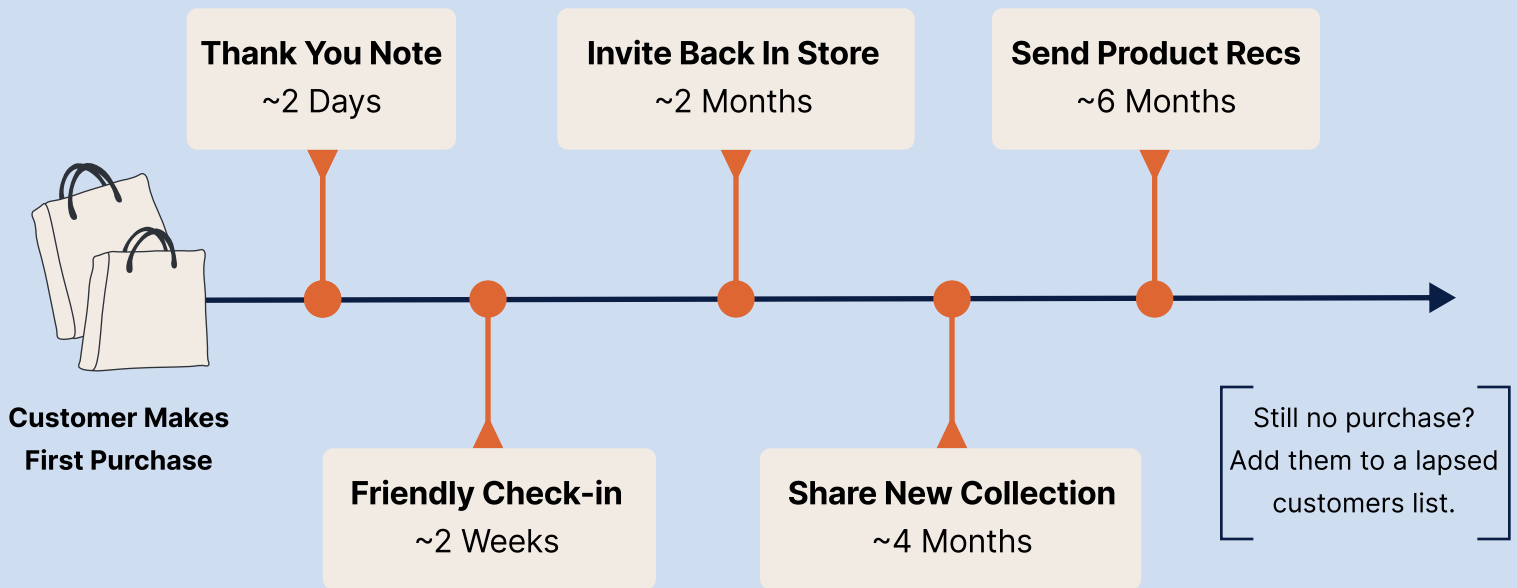
- **Send care and usage tips for their purchase**
- **Offer styling advice or complementary product suggestions**
- **Check in to ensure they're satisfied and using the product**

When the first-month experience is delightful, you become the brand that gave them that jolt of happiness. And next time they need something you offer, they'll think, "That brand totally took care of me last time—count me in."



Customer Journey Recipe

Turn 1st Time Shoppers into Repeat Customers



2 Days Later

Thank You Message

Two days post-purchase is prime time to express gratitude. A quick thank-you message, whether via email or text, solidifies that they made a good choice. This message isn't about selling them anything; it's about reminding them you're appreciative and ready to help if they have any questions.

Hi [first name]! [your first name] here from [store]. Just wanted to say thanks for shopping with me this week - that [product] was made for you! If you have any questions, you have a direct line to me via this number. Hope to see you soon!

2 Weeks Later

Check-In

Around the two-week mark is the perfect time to follow up about their experience. See how they're getting on with the product, offer helpful tips or styling advice, and leave the door open for questions.

Hey [first name]! How's that [product] treating you? I've been pairing mine with [complimentary product] and getting loads of compliments. Would love to hear how you're styling yours!

2 Months Later

Invite Them Back to the Store

If they haven't visited your store yet, it's time to extend the invitation to come back. Show them new arrivals, highlight best-sellers, or remind them how the product they bought fits into the broader lifestyle you're promoting.

Hi [first name]! Would love to see you back in store! I'd be happy to put together a few looks for you to try on when you pop by. Any items you're shopping for?

4 Months Later

Share New Collection Items

This check-in is less about "Where'd you go?" and more about "Look at what's new!" If you have the data, tailor these new product spotlights to their previous purchase or browsing history. If they bought sportswear, show them the new active line.

[first name]! Just unpacked some pieces that feel very much like your style. Would you be interested in taking a look? Let me know and I can get you 20% off your next purchase!

6 Months Later

Send Personalised Product Recommendations

By the six-month mark, you've either seen them purchase again, or you're still waiting. If they're still on the fence, consider this the perfect time to shake things up with curated product recommendations. Use the data you collected: size, colour preference, style, browsing habits—whatever your CRM reveals. Craft a short but compelling message that says, "We thought these items might be perfect for you," and explain why.

Hey [first name], just texted over a custom lookbook I put together based on your style. Let me know which pieces catch your eye and I'll happily set them aside for your next visit!

8-12 Months Later

Time to Consider Them "Lapsed"

Let's face it, after 8 months, it's unlikely they will come back. Perhaps they moved on, or your product was a one-time purchase. But don't write them off just yet—this is still a valuable segment to keep on your list for now. You never know when a life change or a new preference might bring them back.

You can design a "re-engagement" campaign specifically targeting these customers with a more compelling offer or a heartfelt "we miss you" message.

Frequently Asked Questions

1. Why is the second purchase so important?

Because it's the tipping point. Data shows customers are far more likely to return after a second purchase (62% likelihood versus just 27% after the first).

2. What's the ideal time frame to get a second purchase?

Aim for within 90 days. After that, the likelihood of a second purchase drops significantly.

3. Should I always offer a discount to get them back?

Not necessarily. Personalised communication, helpful product tips, and a human connection can work even better. Discounts should be strategic, not your only tactic.

4. What's the most effective outreach method: email or SMS?

SMS has higher open rates and faster responses, but it's best used alongside email as part of a multi-channel strategy.

5. How does Endear help with second purchases?

Endear enables personalised messaging, customer tracking, and timed outreach (like the "2-day, 2-week, 2-month" plan) to boost second purchase rates.

6. Can I automate the second purchase engagement flow?

Yes, Endear allows you to create automated campaigns with check-ins, product highlights, and special offers tailored to customer behaviour.

7. What if I don't have much data from their first purchase?

Ask! Simple, friendly check-ins can gather preferences and build the relationship naturally over time.



Get Local Online- Only Shoppers to Visit In-Store

Why You Should Be Converting Online Shoppers Into In-Store Guests

So you've got an online retail presence that's performing beautifully—congratulations! In 2025, a strong web presence can fuel your brand's reputation and drive serious ecommerce revenue.

But here's the thing: relying solely on online sales can leave your brand feeling impersonal. When customers have never stepped foot inside your store, you're missing out on one of the best ways to build loyalty: face-to-face interaction.

Brick-and-mortar stores aren't going extinct. In fact, despite ongoing challenges with declining footfall on many high streets, physical retail remains vital for building customer relationships and brand loyalty.

In-store visits are good for both the brand and the customer. It allows for that clienteling touch, the upsell, and the sense of belonging that a pixelated shopping basket simply can't match.

In-store visits matter because they lead to:

1. **Deeper loyalty** through emotional connections and memorable experiences
2. **Higher conversion rates** with immediate product interaction and expert guidance
3. **Upselling opportunities** through recommendations from knowledgeable staff
4. **Personal relationships** that build trust and turn casual buyers into brand evangelists
5. **Community building** as you become part of their neighbourhood experience

So how do you encourage those online shoppers, some of whom might not even realise how close they live to your store, off their sofas and into your store?



Tip #1: Identify Local Shoppers in Your CRM

Segmentation is like the sorting hat in Harry Potter: it groups your customers into categories so you can better target them. In this case, you're looking for the "Gryffindor" (or "Slytherin," we don't judge) of local shoppers—people who live within, say, a 5-kilometer radius of your store. This is the group to hone in on with specialised messages.

Step-by-step:

1. **Filter by location:** Focus on customers who live in a certain geographic radius of your store.
2. **Filter by purchase history:** Customers who have made online purchases but never at your store location.
3. **Save your list:** Label it "Local customer but has never visited store" or "Frequent online shopper near our location."
4. **Send targeted messaging:** Craft personalised messaging that speaks to these local customers and invites them to check out your store in a neighbourly way.

By knowing exactly who's in your local area, you can personalise emails or texts along the lines of "Hey neighbour, we're practically around the corner—why not pop in for a real-life brand experience?" This type of outreach feels much more like a friendly invitation than a generic marketing pitch.

Tip #2: Offer In-Store-Only Promotions and Click & Collect

Everyone loves a deal, but even more love an exclusive & personal one. Brands that offer special access, VIP treatment, and a sense of belonging win at customer loyalty. And if your audience can only redeem a certain deal by physically stepping into your store, they might just decide the discount is worth the trip.

Possible In-Store-Only Deals:

- **Flash Sale:** Announce a 10% discount that's only valid in-store. ("Come see us this Saturday between 12 and 4 PM for a flash sale on our new arrivals!")
- **Bundle Offers:** If they've previously bought a jacket online, offer them a discount on matching accessories, but only if they pop in to collect them.
- **Limited Edition Products:** Release a small run of products that can't be purchased online. This fosters a sense of urgency and exclusivity.

The FOMO factor can be incredibly motivating. If they know a deal is short-lived and location-specific, they're more likely to check out your brick & mortar locations.





Tip #3: Offer In-Store Styling Appointments With Their Favourite Sales Assistant

Shoppers love having someone who knows their style, preferences, and fit. If you have sales assistants who've built relationships via chat or email, leverage those connections for in-person appointments.

What this looks like:

- **Personalised Preparation:** Your stylist can pull items in advance based on their purchase history and preferences.
- **Dedicated Attention:** In-store appointments guarantee your customers one-on-one time with a knowledgeable stylist.
- **Calendar Integration:** Make booking seamless with an online calendar link. Let them pick the date and time so it feels on their terms, not forced.

Be sure to use your appointment booking link on well-trafficked pages on your site, such as on your store locator page (to pull in those locals). Likewise, have your stylists extend personal invites. The goal is to make customer feel special, like they're getting a VIP experience.



Tip #4: Create Exclusive In-Store Experiences

Let's face it, we're living in the era of experiences. If you're hosting events that are only accessible in-store, you tap into the age-old human curiosity and that desire to be part of something cool.

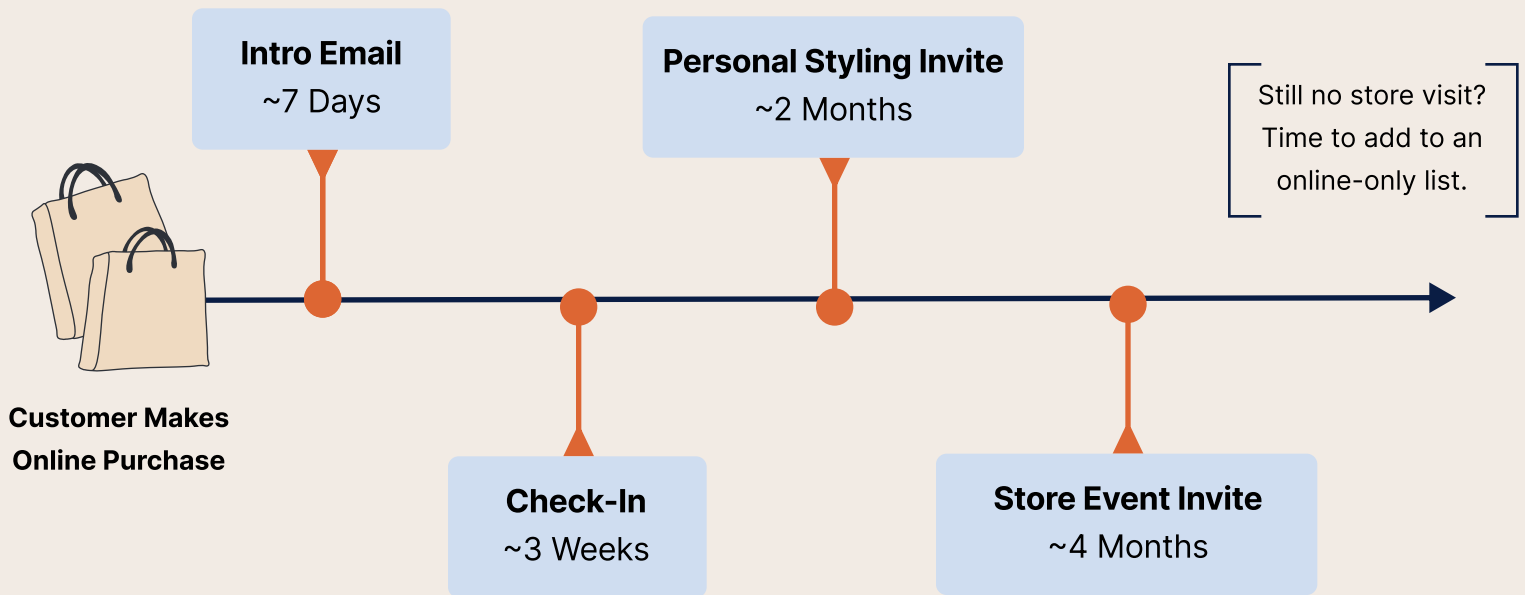
Event Ideas:

- **Influencer Takeover:** Invite a popular local influencer to your store for a meet-and-greet, mini fashion show, or Q&A. Advertise the event to your local CRM list.
- **Mixer or Party:** Wine, cheese, maybe even a live DJ spinning your brand's vibe. People always love free refreshments and a place to mingle.
- **Loyalty Programme Bash:** Reward your top customers with an exclusive after-hours shopping event, or an early VIP preview of your newest line.

By providing a social, festive atmosphere, you transform the typical "store visit" into a mini-adventure. People will want to document it, share it on social media, and talk about it to their friends, which is marketing gold.

Customer Journey Recipe

Get Local Online-Shoppers to Visit In-Store



7 Days Later

Intro Email

The customer is still in the honeymoon phase of their purchase, excited about the items they received or anxiously tracking the package. This is the perfect time to introduce them to your store location without being overbearing.

Hi [first name]! [your first name] here from [brand]. Thanks so much for your recent order! Did you know we have a store right here in [store location]? I'd love for you to pop by and see our latest spring collection in person!

3 Weeks Later

Fit Check-In

About three weeks after purchase, they've had enough time to try the product, break it in, or realise if there's an issue with sizing or style. It's prime time to show you care about their satisfaction and offer in-store solutions.

Hey [first name]! How's that [product] working out for you? If you need any size adjustments or want to see coordinating pieces, our team at the [location] store would be happy to help!

2 Months Later

Personal Styling Invitation

Two months in, they're likely either fully in love with their purchase or perhaps they've only worn it once. Either way, this is a chance to expand their wardrobe or see new arrivals, and if they're local, they may have been thinking about "checking out the store someday."

Ready to build on that look you started in April? You can book a free styling session with me – I'll pull together some pieces based on your style before you arrive. Let me know if you'd be interested!

4 Months Later

Store Event Invite

Four months is enough time for another gentle touchpoint, and if they haven't come in yet, maybe they need a social event or a fresh reason to see the store.

[first name], you're invited! We're hosting an exclusive preview event of our new summer collection this Thursday. Think wine, light bites, and early access. Let me know if you're interested!

Frequently Asked Questions

1. How do I identify local online shoppers?

Use your CRM's location-based filters to find customers who live near your physical stores.

2. What's the best way to get them in-store?

Offer in-store-only promotions, personalised styling appointments, or invite them to exclusive events.

3. What if they never respond?

That's okay. After 6–8 months, treat them as online-only shoppers until their behaviour changes. Adjust your messaging accordingly.

4. Is Click & Collect really that effective?

Yes! Click & Collect not only saves on delivery costs but increases footfall. Many customers end up buying additional items once in-store.

5. Should I offer different messages for local shoppers?

Absolutely. Mention the store location, weather, or local events to make it feel personal and relevant.

6. How does Endear support this in-store push?

Endear helps you segment local shoppers, automate appointment booking, and personalise outreach by shop assistants.

7. What's a good follow-up if they don't book an appointment?

Try inviting them to a public store event or offer a limited in-store perk. Make it casual, low-pressure, and enticing.



Convert Casual Shoppers into Brand Enthusiasts

The Difference Between Casual Shoppers and Brand Advocates

Casual shoppers are aware of your brand, maybe even intrigued, but haven't found a compelling reason to stick around for the long haul. They may come in for a good deal, a seasonal item, or an impulse buy after seeing an online advert, but their purchase history is sporadic.

On the other end of the spectrum are **brand advocates**. These people don't just shop with you—they rave about you to their friends, share their experiences on social media, and actively seek out new product lines or store events. Essentially, brand enthusiasts are walking advertisements.

Turning casual shoppers into brand advocates is like forging a key that unlocks long-term sales growth, word-of-mouth marketing, and a robust community around your brand.

The main difference between the two shoppers is that brand advocates feel *emotionally connected*.

And this emotional connection truly comes from their interactions with other humans, namely your sales assistants. The vanilla scent and perfectly curated playlist that welcomes them into your store is all well and good, but lasting impressions come from clienteling via the human touch.

Our goal is to bridge that gap between casual familiarity and emotional affinity, and to do so in a way that leads directly to increased purchases, greater advocacy, and yes, that unstoppable brand enthusiasm.



Tip #1: Communicate Your Brand Story Early and Often

Your brand story isn't just filler on your "About Us" page. It's the spark that can ignite an emotional connection. People love narratives in books, films, and yes, even in marketing materials. If your casual shoppers don't know what you stand for, they won't develop that sense of "This brand really resonates with me."

How to Implement:

- **Welcome Emails:** Consider sharing a quick, heartfelt narrative about how your brand was founded or the mission you champion. Keep it personal, not corporate.
- **Packaging Inserts:** Use postcards or small inserts in every delivery that highlight a piece of your brand's backstory.
- **Retail Spaces:** Turn your retail spaces into brand experiences with thoughtful touchpoints that tell your story organically.



Tip #2: Personalisation, Personalisation, Personalisation

Collecting the right data in your CRM is the key to delivering relevant, hyper-personal experiences. Casual shoppers often remain casual because they aren't receiving enough personally relevant content or product suggestions that pique their interest beyond a one-off item.

How to Implement:

- **Smart Product Recommendations:** Use purchase history, browsing behaviour, and known preferences to spotlight items they're genuinely likely to love.
- **Segmented Campaigns:** Rather than blasting your whole subscriber list, tailor your messages by segments. If you know someone only buys your footwear, show them the latest boots rather than spamming them with every new T-shirt design.
- **Occasion-Based Outreach:** Did they buy a gift during the holiday season last year? Next year, send them a curated "Gift Guide" just for them. Did they shop for a wedding outfit? Offer event-inspired suggestions next time.

Tip #3: Focus on Community Building

People crave connections. They especially crave connections that validate their sense of style, ethics, or personal interests. By crafting a community around your brand (think forum discussions, social media groups, local events, or brand ambassadors), you make your store less like a business and more like a shared “home base” for like-minded people.

How to Implement:

- **Online Communities:** Set up a Facebook or Discord group for fans to share styling tips, product hacks, or even personal success stories. Your staff can chime in occasionally to keep it lively, but let your fans chat with each other, too.
- **Hashtag Campaigns:** Encourage customers to post on Instagram or TikTok using a specific brand hashtag. Re-share user-generated content (UGC) in your own channels. People love seeing their content acknowledged by the brand.
- **Local Events:** If your brand has a strong local following, coordinate monthly events in or around your store. For example, a running brand could host local jogs. A crafts brand could run mini DIY workshops.





Tip #4: Surprise & Delight: Going Beyond Expectations

Casual shoppers expect a transactional relationship: buy product, receive product, end of story. By surprising them with small extras that they didn't expect, you create a magical moment that's memorable. When repeated over time, those moments build brand affection.

How to Implement:

- **Random Gifts:** Slip a small accessory or sample in their delivery. Don't announce it ahead of time. The element of surprise magnifies their appreciation.
- **Staff Check-Ins:** If someone is a known casual shopper, have a specific sales assistant drop them a text or email: "Hey, just wanted to see if you're still loving that scarf. Let me know if you have any styling questions!"
- **Holiday Surprises:** Don't wait for official gift-giving seasons. National Coffee Day or random quirky "holidays" can be an excuse to send a discount code or free delivery perk.

Customer Journey Recipe

Convert Casual Shoppers into Brand Enthusiasts



7 Days Later

Thank You Email

The customer has now made their second or third purchase, showing they're willing to come back. This is the moment to acknowledge their growing relationship with your brand and suggest how to get more value from their purchases.

Hi [first name]! [your first name] here from [brand]. Thanks for coming back to shop with us! That sweater you picked up looks amazing with our new autumn boots—have you seen them yet? Would love to show you how they pair together next time you're in!

3 Weeks Later

Helpful Tip that Naturally Shares Brand Values

Provide genuine value while naturally sharing what makes your brand special. This creates an emotional connection by demonstrating you care about more than just making sales.

Hey [first name]! Wanted to share this link with some quick care tips to help your sweater last for the long haul. We source all our materials sustainably with the highest possible quality so they're made to last. Hope this helps!

2 Months Later

Store Event Invite

By now they're familiar with your brand and have had positive experiences, making this the perfect time to invite them into your community. Meeting you and the team in person will deepen their connection and make the brand feel like a place they belong.

[first name], we're hosting a cozy autumn gathering at our store next Thursday at 4 pm—think warm cider, local treats, and first looks at our winter collection. I'd love for you to join us and see our new pieces in person!

4 Months Later

Occasion-Specific Outreach Based on Shopping Patterns

Look for patterns in when they shop and proactively reach out during those times to be helpful.

[first name]! Saw you bought some great pieces last holiday season, so I wanted to send over my personal gift guide for this year. Let me know if you're looking to treat yourself or want recs for someone special—I'd love to help!

Surprise and Delight

When they visit the store again, it's time to surprise them with an unexpected gift and handwritten note that shows you appreciate their loyalty. This creates a memorable moment that strengthens their emotional connection to both you and the brand.

[first name]! So great to see you again. I actually set aside this scarf for you—it perfectly completes that cozy autumn look you've been building with us. Consider it a little thank you for being such a wonderful customer!

Frequently Asked Questions

1. What's the difference between a casual shopper and a brand enthusiast?

Casual shoppers engage sporadically. Brand enthusiasts feel emotionally connected and actively promote your brand.

2. What turns casuals into enthusiasts?

Personalisation, storytelling, relationship-building, and consistent surprise-and-delight experiences.

3. How do I tell if someone is moving toward brand enthusiasm?

Track signs like increased purchase frequency, engagement with messages, and average order value.

4. What role does a loyalty programme play here?

A big one. Tiers, perks, and exclusivity can make customers feel rewarded and seen which are the keys to building emotional ties.

5. Why is it so important that my sales assistants message customers?

Outreach from sales assistants feels incredibly personal. It fosters relationships and connections that your marketing outreach simply can't match.

6. How does Endear help nurture brand loyalty?

Endear enables you to deliver personalised messages, track engagement milestones, and train assistants for data-backed clienteling.

7. What if a shopper just isn't engaging?

Keep trying small, personalised gestures. One great interaction can make all the difference. And if not, refine your approach using Endear's analytics.



Identify VIPs and Provide an Exclusive Experience

Why Your VIP Customers Are Your Business' Lifeline

It's 10am. Do you know where your VIPs are?

In the challenging retail environment of 2025, the importance of catering to VIP customers has never been clearer. These elite shoppers aren't merely valuable—when the economy slows, they're vital to a brand's success.

According to a recent report by Bain & Company, top-tier customers (or “very important clients,” aka VICs), typically representing just over 2% of a customer base, can account for nearly half (45%) of global luxury purchases.

Even outside the luxury space, the Pareto Principle (often referenced as the 80/20 rule) holds true, where a small percentage of loyal customers contribute disproportionately to overall sales.

Companies that excel at VIP clienteling can see profit increases ranging from 10% to 20%.

Because of this, identifying and nurturing VIP relationships is a strategic move for sustained retail success for nearly all brands. Companies that excel at VIP clienteling can see profit increases ranging from 10% to 20%, as indicated by research from McKinsey. Clearly, delivering exceptional experiences to VIPs is more than a luxury; it's a business necessity.

So let's talk about what it takes to discover who your VIPs are, and how to cater to them in order to earn their trust and loyalty.

Step #1: Use CRM Data to Identify VIP Customers

Identifying your VIPs goes beyond just spending amounts; it involves sophisticated analysis of shopping frequency, lifetime value, customer engagement, and average order value.

Use your CRM to set VIP criteria and create lists based on the following attributes:

1. **Purchase recency:** How recently did a customer make a purchase?
2. **Purchase frequency:** How often do they buy from you?
3. **Monetary value:** How much do they spend when they shop?
4. **Customer engagement:** Are they engaged and responsive to your campaigns?



Step #2: Assign Dedicated Sales Assistants

Assigning a personal shopping assistant creates an intimate and deeply clienteling experience. This assistant serves as a dedicated concierge, understanding each customer's unique tastes and preferences.

For instance, luxury brand Louis Vuitton famously assigns dedicated client advisors to their highest-spending customers, ensuring personalised interactions and seamless shopping experiences, thereby reinforcing brand loyalty.



Pro tip: Train sales assistants to keep detailed notes in your CRM about personal conversations, family events, and style preferences to reference during future interactions. Remembering the little details will go a long way with making your VIPs feel valued.

Step #3: Provide Exclusive Access and Perks

Early or exclusive access to new collections or limited-edition items creates an immediate sense of privilege and exclusivity.

Brands like Chanel and Gucci frequently use exclusive pre-launch events to drive excitement and reinforce the special status of their VIP clientele. This exclusivity fosters anticipation and loyalty, giving VIPs tangible proof of their esteemed position.



Pro tip: Create "VIP-only" events or experiences that money can't buy—like meet-and-greets with designers, behind-the-scenes studio tours, or private styling workshops. These experiences create stories they'll share and memories that deepen their connection to your brand.



Step #4: Master Tailored 1-on-1 Communication

VIP customers expect communication that feels personal, timely, and relevant to their specific needs and preferences. Gestures like handwritten notes and personalised check ins communicate genuine care and appreciation.

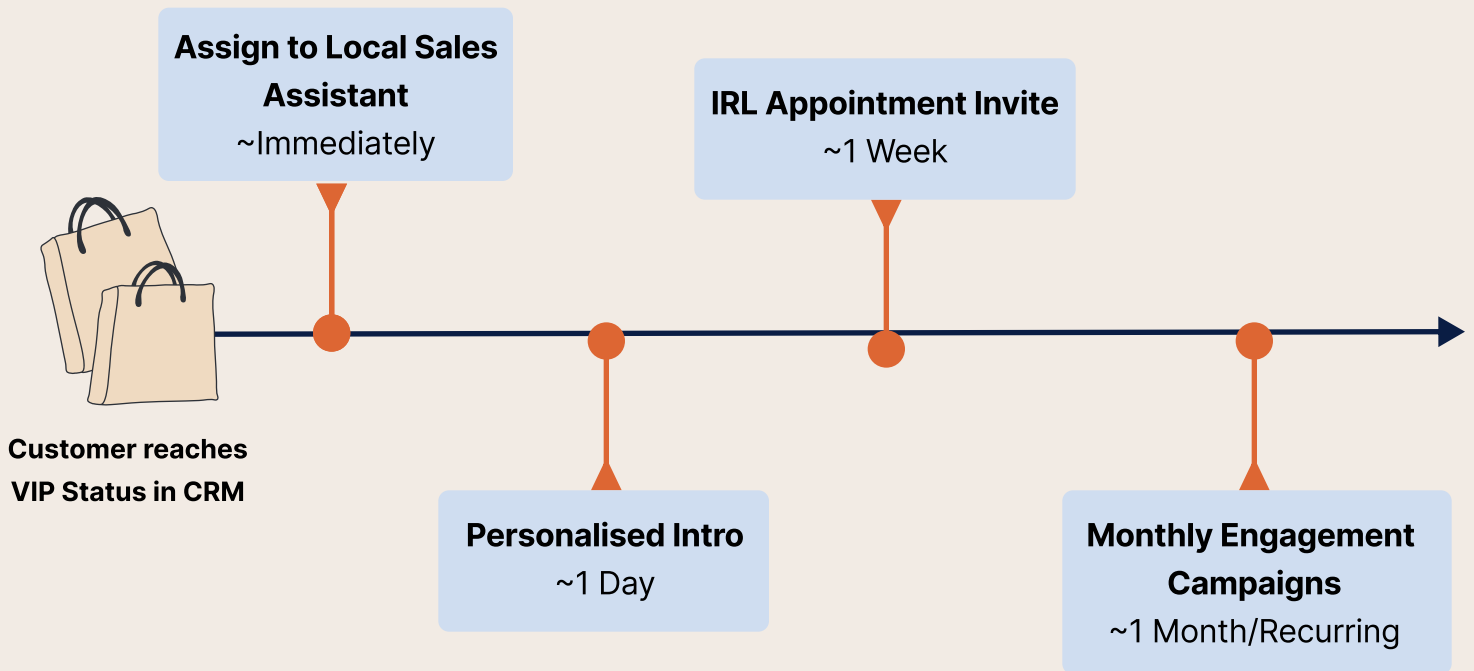
What tailored VIP communication looks like:

- **Personalised product recommendations:** Messages that reference their specific style preferences, past purchases, and lifestyle needs.
- **Milestone celebrations:** Remembering and acknowledging birthdays, anniversaries of their first purchase, or personal achievements they've shared.
- **Consultation-style messages:** Asking for their input on purchases, offering styling advice, or checking in about how they're enjoying recent items.

Pro tip: Use your CRM to track personal details beyond purchase history—note when they mention upcoming vacations, new jobs, or special events. When you reach out about vacation-appropriate outfits before their trip to Italy, you demonstrate genuine care that goes beyond transactions.

Customer Journey Recipe

Identify VIPs and Provide an Exclusive Experience



Customer meets VIP Criteria

Assign Customer to a Local Sales Assistant

Set clear, measurable criteria (spending thresholds, frequency, or engagement levels) within the CRM system. When customers meet these defined metrics, they're automatically flagged as VIPs.

Each VIP customer is then assigned a dedicated local sales assistant, establishing a personalised point of contact. This assistant is well-informed about the customer's history and preferences from the CRM data.

1 Day Later

Personalised VIP Introduction

Within a day of reaching VIP status, the customer receives a personalised welcome message from their assigned sales assistant. This initial communication sets the tone, highlighting the benefits of VIP membership and establishing a personal connection.

Hi [first name]! I'm [your first name], your stylist at our [location] store. Welcome to our VIP programme! I'm here to make sure you get first access to new arrivals and recommend pieces that are perfect for you. Please reach out if you need anything!

1 Week Later

Invitation to Personal In-Person Appointment

A week later, invite the customer to a personalised in-store appointment. During these sessions, customers experience bespoke styling consultations, exclusive product previews, and private shopping experiences tailored precisely to their tastes.

Hey [first name]! I'd love to invite for a VIP styling session! I've curated some pieces I think you'll love based on your past purchases. Feel free to book a time on my calendar at this link!

Every Month

Monthly Engagement Campaigns

The key to long-term loyalty is consistency. Check in regularly with thoughtful recommendations, celebratory messages for personal milestones, and helpful styling tips. These interactions should be extremely personalised and sent from the VIPs assigned associate.

Frequently Asked Questions

1. What defines a VIP customer?

It's not just spend. VIPs are high-frequency, high-engagement customers who respond to exclusive experiences and personal service.

2. Why do VIPs matter so much?

Top-tier customers can make up just 2% of your base but drive up to 45% of sales, especially in luxury markets.

3. How do I find VIPs in my CRM?

Use data filters like purchase frequency, average order value, and interaction history to create VIP segments.

4. What should I offer my VIPs?

Personalised sales assistants, early access, private events, and thoughtful 1:1 communication. Think premium, exceptional service.

5. What's Endear's recipe for VIP engagement?

Step-by-step: assign a sales assistant, send a welcome message within 1 day, invite them to an IRL appointment within a week, then engage monthly.

6. How soon should a customer get VIP treatment?

As soon as they meet your criteria. Immediate recognition is key to building loyalty.

7. What's an example of VIP done right?

Net-a-Porter's EIP programme and Farfetch's Private Client model are prime examples of personalised, high-touch luxury clienteling.



How to Keep Customer Engagement High for Years (and Years!)

Why Long-Term Engagement Is the Ultimate Business Strategy

Loyalty isn't a one-off effort. It's a relationship. And like all good relationships, it needs attention, understanding, and the occasional "thinking of you" text (preferably from a well-informed sales assistant who knows the customer's preferred sweater colour and dog's name) doesn't hurt either.

According to a report from Bain & Company, increasing customer retention rates by just 5% can lead to a 25% to 95% increase in profits. And McKinsey found that brands that lead in personalisation can drive 40% more revenue from those activities than their slower-moving peers.

Keeping your customers engaged for the long haul isn't just because it's nice to do - it's the best way to do business because it continues to pay dividends years down the line.

But customer engagement doesn't just happen once or twice.

It is the ultimate long game that the best retail brands partake in, always trying something new and keeping things fresh. Just like any long relationship, if the touchpoints start feeling stale, they'll leave for more exciting options.

So how do you make sure your customers stay engaged over the long haul through holiday sales, personal milestones, and even the dreaded inbox spring cleanings?

The answer lies in rhythm, relevance, and relationships. And luckily, Endear is built for exactly this. Let's dive into how retail brands can **use Endear's clienteling features to turn one-time sparks into long-term flames.**



Tip #1: Create a Monthly (Not Just Seasonal) Engagement Plan

A big mistake many brands make? They front-load all their communications around the holidays or big product drops. But true engagement is about consistency, not just intensity.

Here's how you can structure your outreach using a robust retail CRM:

- **Product Highlight:** Use your CRM data to suggest a new arrival or staff favourite that fits the customer's style.
- **Milestone Messages:** Birthday coming up? Anniversary of their first purchase? Celebrate it with a personalised text or email. (Text is better!)
- **Styling Tips:** "Shannon! Here's how to wear that jumpsuit you bought last month three different ways this summer." It's a great way to remind your client that you know them intimately, while also providing a useful tip.
- **Replenishment Reminders:** If they bought skincare or consumables, follow up with a "running low?" reminder.



Tip #2: Use CRM Data to Anticipate Needs Before They Ask

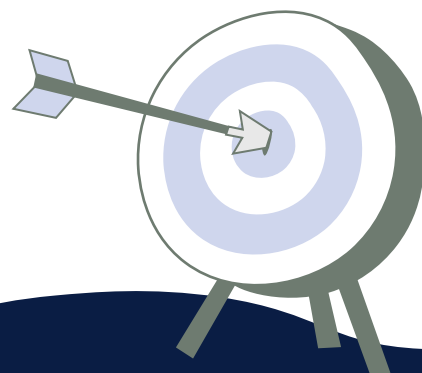
Engaged customers feel seen. And not in the intrusive, privacy-violating way that makes customers uncomfortable, but in a "they really understand my preferences" kind of way. The key is using customer data thoughtfully and transparently, with proper consent under GDPR, to create genuinely helpful experiences.

That's where a great retail CRM can help your team shine. You can track:

- Purchase patterns
- Colour and size preferences
- Engagement history (email opens, clicks, SMS replies)
- Loyalty programme status
- Even past conversation recaps, thanks to AI features

Armed with that data, you can anticipate needs before the customer even realises them.

For example, let's say Alice always buys linen pieces every spring. Come March, her assigned sales assistant can with recommended styles. Now that's proactive clienteling.





Tip #3: Make VIP Engagement Feel Personal at Scale

Keeping customers engaged long-term doesn't have to require enormous amounts of time and manual effort. With the right tools, engaging your customers can be simple and scalable process.

Clienteling AI tools baked into your CRM can do a lot here to keep things feeling hyper personal, even at scale:

- **Conversation Recaps:** Sales assistants can jump into ongoing chats with all the context, so every message picks up where the last left off.
- **Suggested Replies:** No robotic auto-responses here. Just helpful drafts that assistants can customize.
- **Voice-to-Text Notes:** Assistants can record a quick recap of their interaction, and AI will summarize it, draft a follow up, and update the customer's profile with key details.

Using these features, your team can send out thoughtful, unique messages that feel handcrafted...even if you're working with hundreds of customers.



Tip #4: Track What Works, then Adjust

Customer engagement isn't a hands-off approach. What worked in Q1 may flop in Q3. And that's okay, but only as long as you're tracking the right engagement metrics.

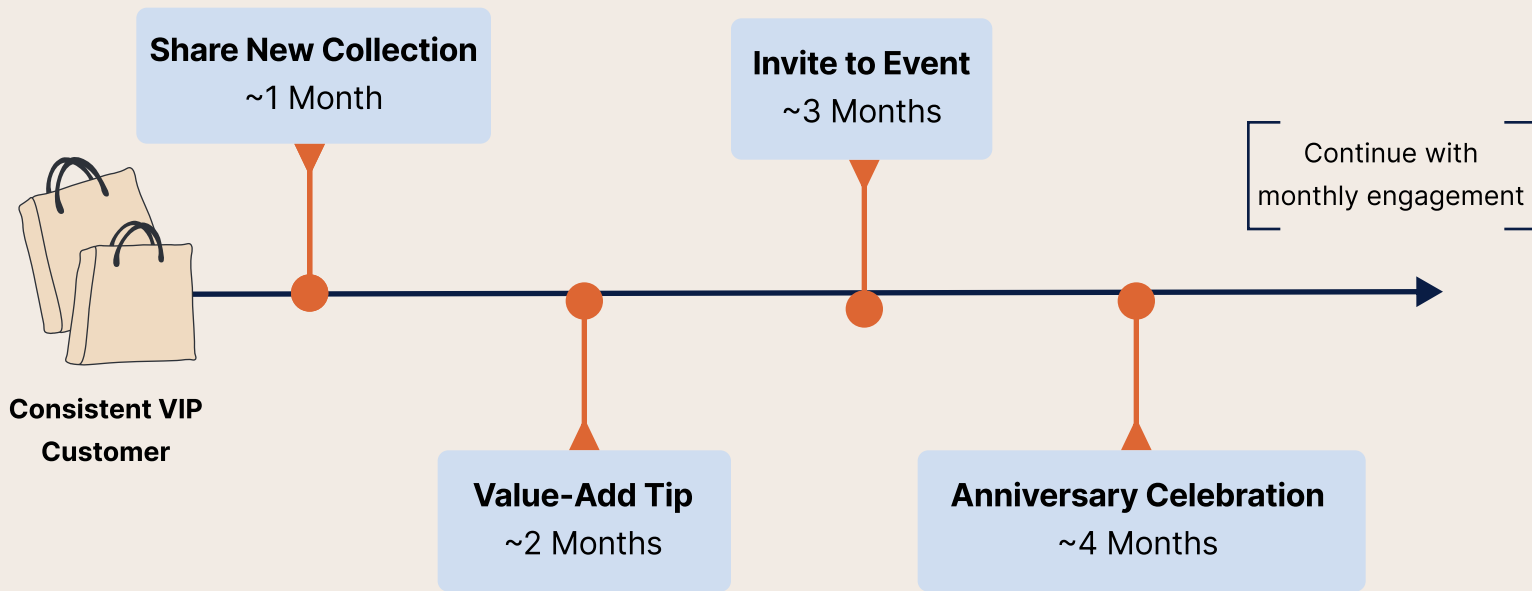
With your CRM's analytics dashboard, you can monitor:

- Open and response rates on messages
- Store visit attribution from campaigns
- Sales driven by specific reps
- Purchase frequency by customer segment
- Days to convert

If engagement starts slipping for a customer (say, fewer clicks, longer purchase gaps), you can course-correct quickly with a reactivation campaign or a surprise & delight message from their assigned sales assistant.

Customer Journey Recipe

How to Keep Customer Engagement High for Years



1 Month Later

Share a New Collection

Keep established customers excited about your brand by giving them early looks at fresh inventory. This maintains their interest and makes them feel like insiders who get to see what's coming before everyone else.

Hey [first name]! Just got in our new spring collection and immediately thought of you—there's a blazer that's perfect for your style. Want me to set it aside so you can see it before it goes on display?

2 Months Later

Value-Add Check-In

Provide genuine value beyond just selling products by sharing helpful tips, care advice, or styling suggestions. This shows you care about them getting the most from their purchases and positions you as a trusted advisor.

[first name]! Saw the weather's getting cooler and remembered that blue dress you love. Quick tip: it looks amazing with a cropped sweater or denim jacket, too. I've been styling mine that way and getting so many compliments!

3 Months Later

Invitation to Personal In-Person Appointment

A week later, invite the customer to a personalised in-store appointment. During these sessions, customers experience bespoke styling consultations, exclusive product previews, and private shopping experiences tailored precisely to their tastes.

Hey [first name]! I'd love to invite for a VIP styling session! I've curated some pieces I think you'll love based on your past purchases. Feel free to book a time on my calendar at this link!

4 Months Later

Exclusive Event Invitation

Invite them to special experiences that make them feel valued and part of your brand community. This strengthens their connections and keeps them engaged.

[first name], we're hosting an exclusive summer styling workshop next Thursday evening—wine, light bites, and personal styling tips. I'd love to have you there since you always put such great looks together!

Frequently Asked Questions

1. How often should I reach out to loyal customers?

Monthly is ideal. Think of it like a friendship: consistent, not clingy. Endear's campaign tools can help automate this cadence.

2. What kind of messages keep engagement high?

Product suggestions, styling tips, milestone messages, and lifestyle content like playlists or care guides. All personalised, of course.

3. How can I keep things from getting stale?

Mix it up. Use surprise gifts, store events, exclusive access, and non-sales check-ins to keep things fresh.

4. What if a VIP stops engaging?

Use CRM data to identify drop-offs early. Launch a reactivation campaign with personal messages or special offers.

5. Can this type of engagement scale?

Yes. With Endear's AI tools like Conversation Recaps and AI Notetaker, teams can personalise at scale without sounding robotic.

6. What metrics should I track?

Message open rates, purchase frequency, AOV, and response times. Use Endear's dashboard to monitor and adjust strategies in real time.

7. How do top brands sustain engagement long-term?

They tell stories, stay consistent, personalise at every turn, and treat customers like VIPs no matter how long they've been around.



Putting It All Together

The Full Journey Strategy



The Complete Checklist

Let's recap the tactics for each journey:

Retain First-Time Shoppers

- ✓ When a customer makes that initial purchase, capture their complete contact information.
- ✓ Create human connection from the start.
- ✓ Make sure their first time was a great time.
- ✓ Set up Endear's full engagement recipe.

Identify and Nurture VIPs

- ✓ Use CRM data to identify your VIPs using a variety of factors.
- ✓ Assign VIPs a dedicated sales assistants.
- ✓ Provide exclusive access and perks.
- ✓ Set up Endear's full engagement recipe.

Convert Online to In-Store

- ✓ Identify local online-only shoppers using your CRM filters.
- ✓ Offer in-store styling appointments.
- ✓ Create exclusive in-store experiences.
- ✓ Set up Endear's full engagement recipe.

Sustain Long-Term Customers

- ✓ Create a monthly (not just seasonal) engagement plan.
- ✓ Use CRM data to anticipate needs before they ask.
- ✓ Track what works, then adjust.
- ✓ Set up Endear's full engagement recipe.

Turn Casuals into Brand Advocates

- ✓ Use your CRM to delivering relevant, hyper-personal experiences.
- ✓ Focus on community building through events.
- ✓ Surprise and delight customers with gifts and personal check ins.
- ✓ Set up Endear's full engagement recipe.

The Journey Never Ends!

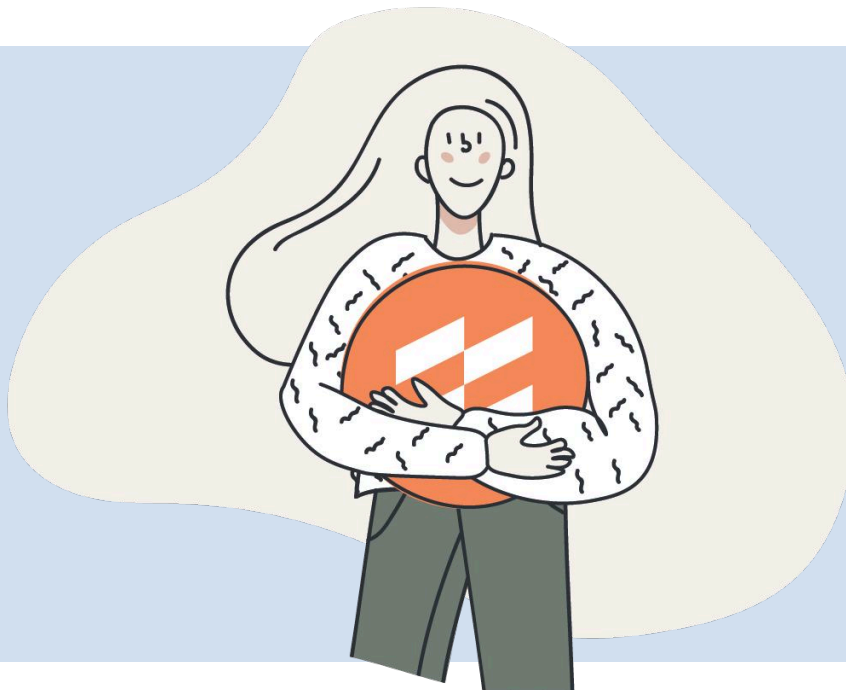
(And It's Easier With Endear)

There is no end to retail, so there is no end to the journey. But now that we've walked through every stage of the modern customer journey: from that all-important first purchase to the long-term relationship-building that turns shoppers into loyal VIPs; we've hopefully convinced you of one thing. In the retail landscape of 2025 and beyond, clienteling isn't just a competitive advantage, it's a strategic necessity.

Whether it's driving that critical second purchase, bringing online shoppers into stores, building emotional affinity with casual customers, or crafting truly exclusive VIP experiences, the brands seeing the most success are the ones that treat customer relationships as their most valuable asset. And they're doing it with intention, personalisation, and consistency.

Retail today demands more than just products and promotions.

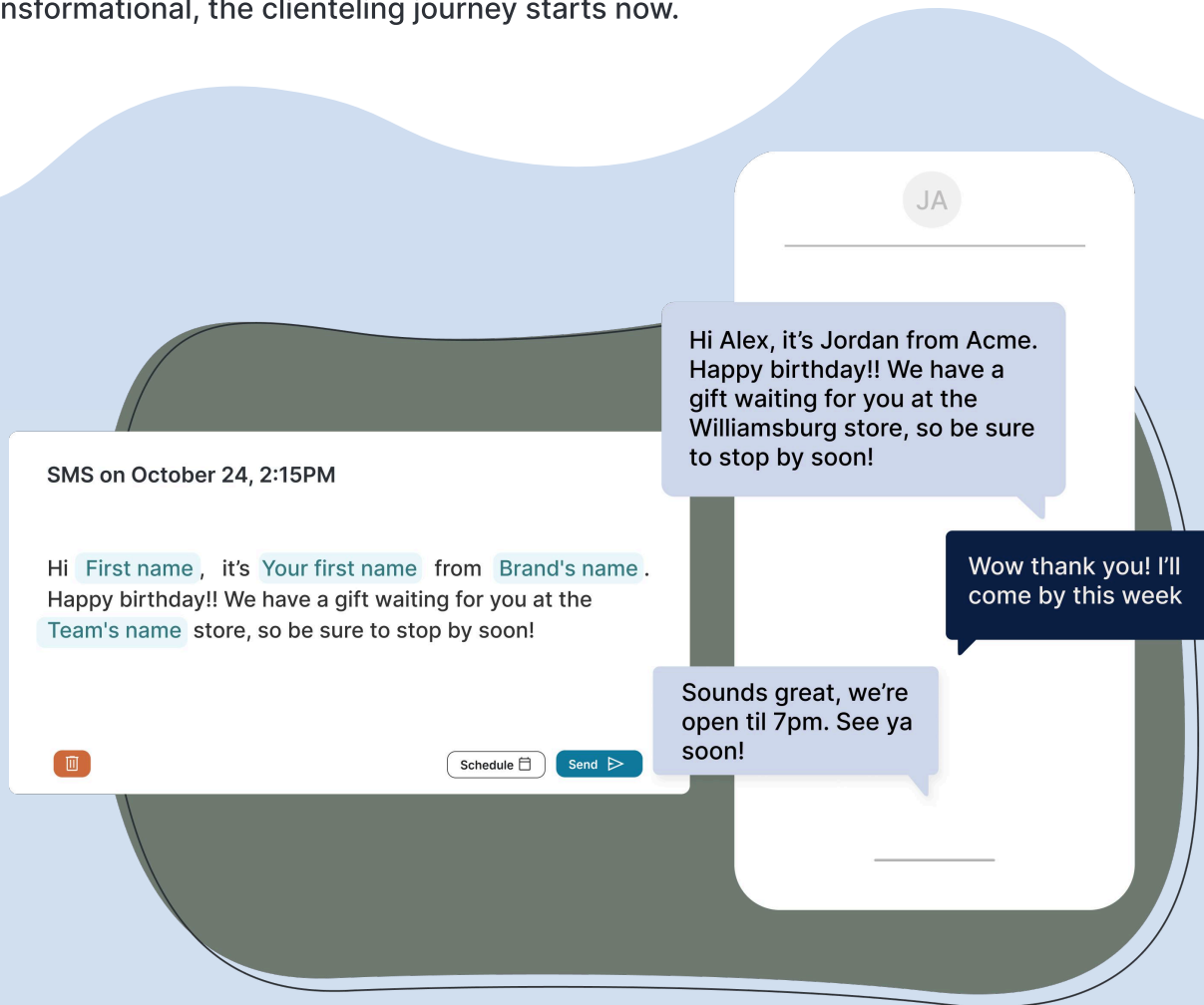
It requires meaningful touchpoints, data-informed outreach, and a clear plan for nurturing customers across every interaction.



Personal clienteling doesn't have to be manual.

Of course, while these tactics can be executed manually, the process becomes far more scalable, streamlined, and impactful with the right tools in place. Yes, the strategies shared in this guide can be executed with or without Endear of course, but with it, they become exponentially easier to manage and measure.

The future of retail is personal. For brands ready to make the shift from transactional to transformational, the clienteling journey starts now.



We're Endear, the AI-powered clienteling platform built to drive sales for omnichannel retail brands. We work with brands like Reformation, Glossier, and Todd Snyder to make it easy and scalable to run customer journeys like the ones in the guide.

To learn more about Endear, visit endearhq.com and book a demo to get a full walkthrough!



Thank you!

