



HOUSE OF FABROSANZ

Royalties Client Book Stylist Handover

Step by step process for identifying enrolling and serving loyal customers

Purpose. Create and maintain a trusted record of loyal House of Fabrosanz and Fabrostyling customers so we can recognise their support, understand their style and fit, and give them thoughtful personalised service.

Responsibility. The Stylist owns and manages the complete Royalties process, including Shopify review, customer selection, profile maintenance and follow-up. The Creative Director approves every enrolment before the customer is contacted as a Royalties customer.

Owner	Stylist
Approval	Creative Director before enrolment
First deliverable	Proposed Royalties customer list
Customer sources	Repeat Shopify customers and returning Fabrostyling custom order customers

Step 1 Create the proposed customer list

Set up one working spreadsheet and keep one record per customer.

- Customer name and contact details
- Shopify customer reference where available
- Customer source: House of Fabrosanz, Fabrostyling or both
- Number of completed purchases or custom orders
- Total spend where available
- Most recent purchase date
- Items or styles usually purchased
- Reason for recommending the customer
- Approval status: Pending, Approved or Not approved
- Creative Director approval date

Important: Mark missing information as “To confirm”. Do not guess or create duplicate customer records.

Step 2 Review Shopify purchase history

- Identify repeat House of Fabrosanz customers from Shopify.
- Check completed purchases, refunds and cancelled orders so the purchase history is accurate.
- Record the products, colours, sizes and categories the customer usually buys.
- Note recent activity and total spend where Shopify provides it.

Selection rule: There is currently no fixed minimum spend or purchase threshold. Prepare recommendations for approval; do not enrol customers automatically.

Step 3 Add returning Fabrostyling customers

- Review Fabrostyling custom order records and existing client relationships.
- Identify customers who return for custom orders, fittings or styling services.
- Record known style, fit and service preferences.
- If the customer also shops through Shopify, combine both histories into one record.

Step 4 Check and submit the list for approval

- Check names, contact details, purchase history and customer sources for accuracy.
- Remove duplicates and resolve information marked To confirm where possible.
- Add a clear reason for recommending each customer.
- Submit the completed proposed list to the Creative Director.
- Record the decision and approval date for every customer.

No customer may be enrolled, contacted as a Royalties customer or promised benefits before Creative Director approval.

Step 5 Create each approved customer profile

Profile section	Information to record
Customer details	Name, contact information, preferred contact method, optional birthday and permission to receive invitations and previews
Personal style	Favourite colours, prints, silhouettes, fit, occasions, dislikes and styling notes
Measurements	Dated measurements, person who took them, fitting notes and alterations
Custom pattern	Pattern reference and storage location where the Pattern Maker has developed an individual pattern
Purchase history	Previous purchases, custom orders, sizes, wish list and suggested future pieces
Relationship record	Invitations, previews, offers, customer responses, last contact and next follow-up date

Accuracy and consent: Use confirmed information only. Customers choose whether to share optional personal information and whether they want to receive invitations and previews.

Step 6 Coordinate measurements and custom patterns

- Arrange measurements with the Tailor when current measurements are needed.
- Record the measurement date and the person who took them.
- Refer individual pattern requirements to the Pattern Maker.
- Record the approved pattern reference and storage location in the customer profile.
- Keep the customer profile updated after every fitting or alteration.

Step 7 Issue the Royalties welcome voucher

After enrolment approval, each Royalties customer receives a **R1,000 shopping voucher** as a welcome benefit.

Value	R1,000
Validity	Three months from the issue date
Minimum spend	None
Use	The customer may use it towards any full priced item
Exclusion	The voucher may not be used on items already on sale

Voucher record: Record the unique code, value, issue date, expiry date and redemption status in the customer profile. Send the voucher with a personalised welcome message and the terms above.

Step 8 Plan personalised customer contact

Use the customer's real preferences and purchase history to decide what is relevant. Appropriate contact may include:

- Exclusive event invitations
- Early previews of new styles selected for the customer
- Private fittings or custom order appointments
- Styling suggestions that complement previous purchases
- Approved loyalty offers or benefits

After every contact, record the date, what was shared, the customer's response and the next follow-up date.

Step 9 Maintain the Royalties Client Book

- Update the profile after purchases, fittings, custom orders and customer conversations.
- Keep measurements and fit notes dated so the most recent information is clear.
- Review upcoming follow-up dates and voucher expiries regularly.
- Keep customer information in a restricted company location, separate from the general staff handbook.
- Use the company project template to track progress, deadlines, missing information and blockers.
- Raise any customer concern or approval request with the Creative Director promptly.

First deliverable

Prepare the proposed Royalties customer list from Shopify and Fabrostyling records and submit it to the Creative Director for approval.

Stylist	_____
Date assigned	_____
Submission deadline	_____
Creative Director review	_____