

Program Performance Query - Shop Owner Guide

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What This Query Does

This query analyzes every customer who has visited your shop and gives you **143 data points** about each person. Think of it as a complete customer intelligence report that tells you:

- Who your best customers are
- When they're likely to return
- How your rewards program is working
- Which customers need attention NOW

The Data Fields - Explained in Plain English

BASIC CUSTOMER JOURNEY

first_visit_date

- The very first time this customer came to your shop
- Calculated: Looks at all their repair orders and finds the earliest one

first_visit_shop_name

- Which of your locations they visited first
- Why it matters: Shows if customers discover you at one location but prefer another

first_visit_spend

- How much they spent on that first visit
- Important: First impressions matter - this shows if they came for oil changes or major repairs

second_visit_date

- When they came back the second time
- Why it matters: If they came back, you earned their trust

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days_between_visits

- How many days between first and second visit
- This is GOLD: Shows how long it took to convert them from "trying you out" to "coming back"

CUSTOMER CLASSIFICATION

customer_type - This is where the magic happens. Every customer gets labeled:

- **VIP Customer:** High spenders, frequent visits, came recently. Your royalty.
- **Great Customer:** Regular visitors with good spending. Your backbone.
- **Loyal Customer:** They keep coming back. Appreciate them.
- **Good Customer:** Solid repeat business. Room to grow.
- **So So Customer:** Irregular visits. Could slip away.
- **Existing Customer-Slipping:** Haven't seen them in a while. RED FLAG.
- **Existing Customer-Last Chance:** About to be lost. URGENT.
- **Lost Customer:** Gone. Learn from them.
- **New Customer:** Just arrived. First impression time.
- **New Customer-Slipping:** Came once, it's been too long. Act fast.
- **One and Done:** Came once, never returned. What went wrong?

How customer_type is calculated: The query looks at three things:

1. When was their last visit (recent vs long ago)
2. How much they typically spend (compared to your shop averages)
3. How often they visit

Then it compares these to your shop's historical percentiles (like the top 70%, top 50%, etc.)

customer_grade - Letter grades A+ through F based on spending:

- **A+:** Spending 1.5x your top 10% average
- **A:** In your top 10% of spenders
- **A-:** In your top 20% of spenders
- **B:** In your top 30% of spenders
- **C:** In your middle 50% of spenders
- **D:** In your bottom 20% of spenders
- **F:** Below your bottom 20%

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REWARDS PROGRAM INTELLIGENCE

rewards_card_date

- When they signed up for your rewards program
- Calculated: First time we see a card activation in the system

rewards_card_timing

- When did they sign up relative to their visits?
- Options: "On first visit" | "On second visit" | "Between visits" | "After second visit"
- Why it matters: Shows which approach works - immediate signup vs earning it

visits_before_card_issued total_spend_before_card average_spend_before_card

- What they did BEFORE becoming a rewards member
- Baseline to compare against their post-card behavior

visits_after_card_issued total_spend_after_card average_spend_after_card

- What they did AFTER joining rewards
- This shows if the program actually changed behavior

program_participant (Yes/No)

- Have they actually USED the program?
- Calculated: Did they redeem points OR donate to charity OR refer someone?
- Critical: Having a card doesn't mean they're engaged

DONATIONS & CHARITY

first_donation_date first_donation_amount charity_name

- When they first donated rewards to charity
- Which charity they chose
- Shows community-minded customers

charity_count

- How many different charities they've supported
- High numbers = deeply engaged customers

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visits_between_card_and_first_donation

average_spend_between_card_and_first_donation

- How many visits before they donated
- What they spent during that period
- Shows the "activation journey" - how long to engage with program

visits_after_first_donation total_spend_after_first_donation

- Behavior AFTER they became charity donors
- Often shows increased loyalty and spending

REFERRAL ACTIVITY

was_referred (Yes/blank)

- Did another customer refer them?
- Referred customers often have higher lifetime value

referrals_made

- How many people THEY referred
- Your customer evangelists show up here

SPENDING PATTERNS

total_visits

- All-time visit count across ALL locations
- Calculated: Every completed repair order

total_spend

- All-time spending across ALL locations
- Calculated: Sum of (labor + parts - discounts)

average_ro (RO = Repair Order)

- Average ticket size across all time
- Calculated: $\text{total_spend} \div \text{total_visits}$

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cus_spend_50

- The median amount this customer spends per visit
- Better than average because it's not skewed by one huge job

RECENT BEHAVIOR (The "Epoch" Fields)

The query tracks a "recent epoch" - last 2.4 to 3.25 years

ttl_visits_epoch

- Visits in the recent period
- Why 2.4 to 3.25 years? It's tuned to your shop's customer cycle patterns

total_spend_epoch average_ro_epoch

- Spending in recent period
- Shows current patterns vs historical

first_ro_epoch / last_ro_epoch

- First and last visit in recent period
- Helps identify newly returning customers

days_since_last_visit

- Simple: Today minus last visit date
- The most urgent metric - who needs attention NOW

avg_days_between_visits_epoch

- Average gap between visits in recent period
- Calculated: All the gaps added up ÷ number of gaps
- This is your "customer heartbeat" - their natural rhythm

THE CRYSTAL BALL - PREDICTION FIELDS

projected_next_visit

- When we expect them back
- Calculated: last_visit + avg_days_between_visits
- Used to know who's overdue

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return_probability (0-100%) This is sophisticated:

- If they're not overdue yet: Uses exponential decay based on how close we are to their expected return
- If they're overdue: Uses historical data from thousands of customers to show probability they'll still return
- Example: 85% means "based on customers with similar patterns, 85% came back"

will_return_in_3_months (Yes/No)

- Simple flag: Are they expected within 90 days?
- Calculated: projected_next_visit within next 3 months OR already overdue with >50% return probability

return_month_window

- Which month they'll likely return: "Overdue" | "Month 1" | "Month 2" | "Month 3" | "Beyond 3 Months"
- Helps prioritize outreach

visit_interval_trend (Decreasing/Stable/Increasing)

- Are the gaps between visits getting shorter or longer?
- Calculated: Compares last 3 visits average to overall average
- "Decreasing" = Coming more often (GOOD!)
- "Increasing" = Drifting away (WARNING!)

last_3_visits_avg

- Average days between their last 3 visits
- More sensitive to recent changes than overall average

QUARTERLY TRACKING (Period Fields)

The query tracks 9 quarters (period_0 through period_8):

- **period_0** = Most recent 3 months
- **period_1** = 3 months before that
- **period_8** = Oldest quarter (24 months ago)

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For each period you get:

- **period_X_visits**: Number of visits
- **period_X_spend**: Total spent
- **period_X_avg_spend**: Average per visit
- **period_X_quarter**: The actual date range

Plus rewards activity:

- **period_X_redemptions_count**: How many times they used points
- **period_X_value_redeemed**: Dollar value redeemed
- **period_X_add_values_count**: How many times they earned points
- **period_X_value_added**: Dollar value earned

Why this matters: You can see trends quarter by quarter:

- Are they visiting more or less?
- Is spending going up or down?
- Are they engaging with rewards more?

YEAR-OVER-YEAR COMPARISONS

year_1_spend / year_1_visits / year_1_avg_spend

- Sum of periods 0-3 (most recent year)

year_2_spend / year_2_visits / year_2_avg_spend

- Sum of periods 4-7 (previous year)

Quick way to see: Are they more valuable this year than last year?

ADVANCED METRICS

estimated_days_between_visits

- For customers with limited history, this estimates their cycle
- Based on their customer_type and shop-wide patterns
- Used when we don't have enough visits to calculate individual patterns

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g_days (gap days)

- If overdue: How many days overdue they are
- If not overdue: How many days until expected return
- Helps prioritize your call list

visit_dates_epoch

- Comma-separated list of all visit dates in recent period
- For quick visual scanning of visit patterns

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How To Use This Data

Daily Actions

1. Filter for **customer_type = "Existing Customer-Slipping" or "Last Chance"**
 - Call these customers TODAY
2. Sort by **return_probability** descending where **return_month_window = "Overdue"**
 - Your call list in priority order

Weekly Reviews

1. Check **will_return_in_3_months = "Yes"**
 - Plan your service capacity
2. Review **program_participant = "No"** where **rewards_card_date IS NOT NULL**
 - Cards issued but not used - why?

Monthly Strategy

1. Compare **year_1_avg_spend** vs **year_2_avg_spend**
 - Are customers more valuable over time?
2. Look at **visit_interval_trend**
 - Identify customers drifting away before they're lost

Find Your Best Customers

- **customer_type = "VIP" or "Great"**
- **customer_grade = "A+" or "A"**
- **referrals_made > 0**
- These are your evangelists - treat them like gold

The Power of This Query

This single query replaces what would normally require:

- A CRM system (\$500-2000/month)
- A business intelligence team
- Multiple expensive reports
- Hours of manual analysis