

Milk Round Tracker

Monthly client management: status, pipeline, revenue health, referral log

Companion to Chapter 8: The Milk Round

Part of the HTSABWAM Toolkit — register your copy at [\[link\]](#) to unlock

David White | How To Start A Business Without Any Money

A Customer Pays Once. A Client Pays Repeatedly.

The milk round is the difference between a business that starts from zero every month and one that has a base. This tracker keeps the milk round running — not by adding complexity, but by making the right things visible at the right time.

Complete it once a month. It takes twenty minutes. It will tell you things you didn't know you needed to know.

Section 1: Client Status Board

Client	Monthly £	Last contact	Next action	Health	Notes
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	
	£			 /  / 	

Health key:  Strong / renewing  Needs attention  At risk / review required

Section 2: Revenue Health Check

Metric	This month
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Total recurring revenue (existing clients)	£
New client revenue (first month)	£
Total revenue	£
Recurring % (recurring ÷ total × 100)	%
Target recurring %	80%
Gap to target	%

Section 3: Referral Log

Who I asked	Result / introduction made

Referrals received this month: _____ | Converted to clients: _____

Section 4: Problem Client Review

For any client showing  in the status board, or any client consuming disproportionate time:

Client	Revenue vs. true cost (hours × your hourly rate)		
	Revenue: £	True cost: £	Decision:
	Revenue: £	True cost: £	Decision:

Section 5: Monthly Milk Round Score

Question	Score (1–5)
Did I over-deliver on at least one client this month?	
Did I make the next offer before work ended — while results were visible?	
Did I stay in touch with at least three clients without selling?	
Did I ask at least two clients for a referral?	
Is recurring revenue above 60% of total?	
TOTAL (out of 25)	

Score 20–25: Milk round strong. Score 15–19: Solid foundation, one area to focus on. Score 10–14: Systems need attention. Score under 10: Return to Chapter 8.

HTSABWAM Toolkit | <https://firstbusinesskit.com/> to access the full toolkit