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Retain and Reward Customers

WITH CAMPAIGN MONITOR BY MARIGOLD

Get up and running with your Points Program in Campaign Monitor by Marigold using this checklist as a guide.

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What is a loyalty program?

A loyalty program rewards or incentivizes customers to keep them coming back to your business.

When a customer buys more products or interacts with your business, they earn rewards like discounts or free products. To put it simply, a loyalty program is designed to keep customers engaged!

What is a points program?

A points program is a type of loyalty program that allows customers to earn points when they buy a product or engage with your business in some way. As a customer accrues points, these points can:

- Be exchanged for a discount or gift card
- Be exchanged for a free product
- Be exchanged for free shipping
- Be used to set up tiers that provide exclusive discounts or offers

Building your *loyalty program*

This ongoing process of updating and improving your loyalty program helps keep customers more engaged.

Part 1: Design your points program

☐ Step 1: Set goals for your loyalty program

Consider what you'll want to achieve with your loyalty program. Are you aiming to reduce customer churn, or are you looking to increase the amount each customer spends?

By getting clear on your primary objectives and the metrics you'll want to measure, you'll be able to better the success of your loyalty efforts.

☐ Step 2: Determine how customers will earn points

Identify the primary ways that you'll want to drive customer loyalty. Listed below are some examples of activities within loyalty programs that can generate points for customers:

- Creating their own account / sign-up bonus
- Purchasing a product or service
- Spending a specific amount of money
- Sharing a product or article with a friend
- Interacting with social media posts
- Providing a product review
- Submitting answers to a poll or survey
- Referring a friend to create an account
- Referring a friend to purchase a product or service

You'll want to make sure there are multiple ways for your customers to earn points. You'll also want to take into consideration how your customers are interacting with your brand today. Rewarding customers for actions they already do today will prompt them to continue that behavior.

Step 3: Choose how you'll reward your customers

Determine what types of rewards your customers can receive. This is an important part of the process as the perceived value of the reward is what drives your customers to engage with you. Remember, your customers aren't interested in the points - they're interested in what they can get with the points! So be sure to provide them with a variety of desirable rewards.

A few suggestions of what you can reward your customers with include, but are not limited to:

- A free product or service
- A discount or gift card
- Free shipping
- Exclusive or early access to products not typically purchasable
- Exclusive or early access to promotions

Note: At this time rewards must be managed outside of Campaign Monitor by Marigold. We recommend generating coupons for the types of rewards you'd like to provide within your e-commerce system. These coupons can then be emailed to subscribers by a campaign in Campaign Monitor by Marigold.

Step 4: Determine how many points your customer will receive based on the dollar value spent.

Deciding how many points a customer gets for each purchase can make or break your program. If it takes a customer years to earn enough points to redeem just one reward from you, then they may decide that your program offers little value to them. Be sure to set the number of points customers receive by considering factors such as the average frequency of their purchases within a specific period and the typical order value.

☐ Step 5: Develop a messaging framework and email marketing plan to introduce your program

Now that your loyalty program's foundational strategy is established, the next step is to develop a plan for marketing and introducing it to your customers. You'll want your messaging to be consistent, compelling, and concise so that you're effectively communicating the value of your loyalty program to your customers. Be sure to introduce and explain your program across all of your channels, such as:

- Website
- Email
- Mobile App
- Social media
- In-store materials
- External channels (ads, radio, etc)

And don't forget to personalize the messaging in these channels! Be sure to create messages that drive engagement. You can go even further by offering special rewards to your top customers or personalizing the messages on banners and images on your website or in your emails.

☐ Step 6. Create the program's terms and conditions

Specifically call out the program's purpose, rewards, eligibility, and/or restrictions. You want to avoid any bad actors from taking advantage of your program so be sure to establish your program's rules, like earning/redemption rules, expiration policies, and penalties for fraud.

☐ Step 7. Create FAQs to help customers with common questions

If customers skip reading your terms and conditions, you're likely to encounter a lot of questions about your loyalty program. Create a helpful FAQ that identifies the most common questions and concerns. You'll want to anticipate your customer's concerns and provide clear instructions.

☐ Step 8. Create automated messages

Dedicate time to develop the messages that will be delivered to customers in your loyalty program. You'll want to be sure to include details around how many points the customer may have (or the tier they're in) or how many points they've accrued after an action. Some message examples include:

- Account creation (includes the current amount of points/points gained/etc.)
- Account deletion (includes deletion of points/link to terms and conditions/etc.)
- Actions that accrue points (purchases/reviews/shares/social media actions/etc.)
- Actions that decrease points (reward redeemed/point expiration/etc.)
- Tier upgrades or downgrades
- Program updates

Part 2: Build your points program

Step 1. Set up loyalty data in Campaign Monitor

If you're just starting your loyalty program, you'll need to make sure your list has the following recommended custom fields. These fields will allow you to run a loyalty program smoothly in Campaign Monitor.

Create a **new list** with the following fields.

Custom Field Name	Data Type	Personalization Tag	Description
Points Balance	Number	[PointsBalance]	Subscriber's currently available loyalty points.
Total Points Earned	Number	[TotalPointsEarned]	Total loyalty points the subscriber has earned all time.
Total Points Redeemed	Number	[TotalPointsRedeemed]	Total loyalty points the subscriber has redeemed.
Last Order Value	Number	[LastOrderValue]	The dollar value of the subscriber's last order.
(Optional) Last Coupon Code Used	Text	[LastCouponCodeUsed]	The last coupon code the customer has used.
Increase Points	Text	[IncreasePoints]	A custom field that is set to "true" or "false" used to enter a subscriber into a segment - pulling them into a journey that will adjust the points balance.
Decrease Points	Text	[DecreasePoints]	A custom field that is set to "true" or "false" used to enter a subscriber into a segment - pulling them into a journey that will adjust the points balance.

Adding these fields can be done within the Campaign Monitor UI or you are free to use the **Lists API** to add these fields.

Step 2. Create your segments in Campaign Monitor

To trigger Points Program-specific journeys in Campaign Monitor, you'll need to create segments in your loyalty list. Navigate to your loyalty list in Campaign Monitor and create the following segments:

- A segment for each reward threshold or tier level
- A segment that subscribers join when their points need to be increased
- A segment that subscribers join when their points need to be decreased

Learn more about segments in our **technical guide**.

Step 3. Initialize loyalty data in Campaign Monitor

There are currently 3 ways to ingest loyalty data in Campaign Monitor at this time. You can either:

1. Upload a CSV file in Campaign Monitor with the **Points Balance, Total Points Earned, Total Points Redeemed,** and **Last Order Value** custom fields populated for each subscriber..
2. Call the **Subscriber API** to update the **Points Balance, Total Points Earned, Total Points Redeemed,** and **Last Order Value** custom fields for each subscriber in your list.
3. If you have an existing CRM that captures this information and you've integrated the CRM into Campaign Monitor, this data will automatically be passed into Campaign Monitor via the integration. Note that the information must be stored at the subscriber level. See the list of available CRM integrations **here**.

If you are just starting your loyalty program, the values for each custom field will be set to "0". Otherwise, populate these fields with the appropriate values from your existing program.

Learn more about ingesting data in our **technical guide**.

☐ Step 4. Build your loyalty automations to increase or decrease points balance

Automations are necessary to run your loyalty program smoothly and efficiently, as well as send relevant messages to customers related to your loyalty program. You'll want to create different journeys based on the type of message that needs to be sent, but the typical flow will look as follows:

When a customer completes an action,

Increase or decrease their loyalty amount,

(Optional) And follow-up with a message confirming the action.

To update a subscriber's points amount and send them rewards, they'll need to be added to a journey. For instructions on how to build points program journeys, check out our **technical guide**.

Redemption journeys

Campaign Monitor supports providing a customer with a coupon code automatically when they hit a rewards threshold. The customer will ideally receive another coupon when they've achieved another rewards threshold.

☐ Step 5. Update the "Increase Points" or "Decrease Points" custom fields to trigger automations for your subscribers

Since punch card data will primarily be updated from inside an automation, you'll need to add your subscribers to a journey based on a segment entry. You created your segments earlier in Step 2 (Part 2). So when either the **Increase Points** or **Decrease Points** custom field is set to true, they'll be added to a journey you've created.

You'll also want to know how much to increase your subscriber's Points Balance if a purchase was completed. Specifically, you'll want to increase their **Points Balance** based on the dollars spent on their last order (not including shipping and/or taxes). This can typically be found in your eCommerce or POS system and should be stored in the **Last Order Value** custom field.

Follow your method of choice to update these fields appropriately.

☐ Method 1: Upload a file to Campaign Monitor

If you have no technical resources, uploading a file with the most up-to-date data is the simplest way to make sure your loyalty journeys are triggering appropriately.

Learn more about this method in our **technical guide**.

☐ Method 2: Call the Campaign Monitor API

For those with technical resources, calling the Campaign Monitor API is the most flexible way to run a loyalty program. If you've followed the steps listed in Part 2 (Step 2), those custom fields are available for you to adjust when a subscriber does an action that will increase or decrease their points.

Note: You will need to have access to the subscriber's email and list they're in to update a single subscriber's information via API call.

Learn more about this method in our **technical guide**.

☐ Method 3: Update data via Zapier integration

If you have a Zapier integration, you can easily transfer data from your app into Campaign Monitor! Having a Zapier integration gives you access to data from any **app that it supports**! You won't need to worry about any overhead required to manually call APIs from your store or website.

Learn more about this method in our **technical guide**.

☐ Step 6. Update campaigns in Campaign Monitor to surface loyalty points

Keeping customers updated on their point balance, the points required for discounts or products, and the points needed to reach the next loyalty tier can encourage them to buy more or engage more with your brand. A message that says "you need 10 more points for your next reward" incentivizes the customer, driving them towards a milestone or finish line!

For instructions on how to surface loyalty information in your emails, visit our **technical guide**.

☐ Step 7. Generate campaigns in Campaign Monitor to create loyalty messages triggered in Automations

Earlier, you made plans to create automated messages that will help drive and inform customers about your loyalty program. Now is the time to create those messages! In Campaign Monitor, you can create individual campaigns based on the messages you want to send. Once those campaigns are created, trigger these messages to be sent to your customers within an Automation.

☐ Step 8. Define and monitor your loyalty program KPIs

The first step you took in planning a successful loyalty program was to set goals. Based on the goals that you made, you'll want to define and start monitoring KPIs related to them. For example, was your goal to increase the amount each customer spends with you? Then begin tracking how much revenue customers within your loyalty program generate before they churn/disengage from you.

These key performance indicators (KPIs) will vary depending on your goals. However, you can view metrics within your CRM, Google Analytics, or any other analytics platform of your choice and filter that data based on the segments you've created within Campaign Monitor.

Part 3: Launch your loyalty points program

Step 1. Train your staff members

Make sure your teams are educated about the program. To do this, you'll need to prepare training materials for frontline team members, customer support, social media moderators, and more.

Supportive training material should cover:

- How to use the loyalty system properly
- What the loyalty program is about and its goal
- Detailed rules of how the program is run
- Core benefits for customers
- How to recommend and sell the program (include sample scripts if necessary)
- FAQ for employees
- A method to report any issues, problems, and suggestions

Step 2. Prepare a roll-out checklist

You've most likely created roll-out plans across multiple teams, technologies, and channels to support your loyalty program. To launch successfully, you'll want to prepare a checklist with all the touchpoints that you need to verify during the day of release.

- Technology - CRM, e-commerce systems, websites, Campaign Monitor, etc.
- Loyalty account / general account creation
- Points issuance
- Points redemption
- Visibility and accuracy of data in reports

Step 3. (Soft) Launch!

Launch your program and promote it across all of your target customer segments and channels! Optionally, you can start with a "soft launch" to a smaller group of highly engaged customers. A soft launch ensures you can capture and quickly resolve any bugs this small group has found or improve any gaps in your program.

Step 4. Gather customer feedback

Now that you've launched your program, you'll want to gather feedback from customers who were quick to jump into your program. Doing so will help you identify areas that you need to improve and refine.

Part 4: Manage and optimize your loyalty program

☐ **Step 1. Monitor and analyze your performance data**

Now that your program is running, you'll want to continuously analyze the performance data of your program. Within Campaign Monitor, you can look at how your customers are engaging with loyalty program-specific campaigns with our **Insights** tool. You can compare the engagement of program participants with non-participants to determine if your loyalty campaigns and their content lead to increased opens and clicks. This will help communicate the value of the program to your stakeholders.

Per previous steps, additional data around your program can be monitored within Google Analytics, your CRM integration, or the analytics platform of your choice.

☐ **Step 2. Conduct program reviews**

As you monitor the KPIs you set up for your program, you'll want to make sure that the program continues to align with your business goals. If you find that certain goals for KPIs are not being met, adjust your program as necessary.

☐ **Step 3. Look for bug fixes and make improvements based on feedback**

Monitor which rewards your customers are driven to, the ways they're earning points, or other benefits of the program they're utilizing. If there are benefits or entry points customers don't use or have issues with, adjust them as necessary so that your program evolves with your customers' needs and desires.

☐ **Step 4. Optimize your communication strategy**

After you've launched your program, you'll want to continuously communicate its benefits to both loyalty and non-loyalty participants. Develop a loyalty calendar to tailor messages for both audiences, select the appropriate channels, and target specific segments to maintain and boost participation in your program. You'll also want to refine the messages you send to those who've already signed up for your program to drive further engagement with your brand.

☐ **Step 5. Refine the redemption process**

After a few customers have redeemed points or other rewards, you'll most likely receive feedback on this process. Improve this step of your program based on that feedback to increase customer satisfaction and show the customer that your program is always evolving and providing constant value.

Conclusion

Building a successful loyalty program is not a one-and-done activity.

To make the most out of your program, you'll want to constantly improve any glaring issues or experiment with different approaches as you learn more about how your customers interact with your program.

For more information, please visit our **technical guide**.

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