LOYALTY LOUNGE
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CX ANONYMOUS, SEASON 2, EPISODE 1

Loyalty Lessons: Launching Loyalty Campaigns

Summary

Amber Collins, Scott Shurson, and Jake Madrigal discuss loyalty programs, customer behavior, and data-driven strategies for enhancing customer experience.

Questions Answered

- What are the key differences between a marketing campaign and a loyalty campaign?
- How can businesses effectively integrate loyalty programs into their customer communication strategy?
- What are some best practices for launching a successful loyalty program?

HIGHLIGHTS

On Loyalty Campaigns: "The customer success team is really kind of there holding the hand of the client once they go live to really get the most of their experience with Annex Cloud and their loyalty program itself." — Jake Madrigal [00:41 - 01:15]

On the Loyalty Lounge: "I think the loyalty lounge has been a great addition for our clients. Just a safe space to kind of talk about what they're seeing with their program, maybe looking for different recommendations." — Jake Madrigal [02:06 - 02:22]

Differentiating Campaigns: "Standard marketing emails, marketing campaigns for loyalty, or kind of a focused loyalty campaign on maybe a segment or a core group of products, that's a little bit of the difference between those two." — Jake Madrigal [02:53 - 04:59]

On Influencing Behavior: "Once a client has gone live, once their programs in production, as we call it, and is out there for the audience to see, that's where the focus becomes much more targeted on what types of behaviors can we influence, what types of goals can we drive with loyalty." — Jake Madrigal [06:12 - 06:55]

On Overexposing Loyalty: "We really advise clients to overexpose loyalty from that perspective. Right. So, when a customer's opening a normal email communication, then just might be, hey, we have a sale or we have a new product, whatever that may be in the header, like you're mentioning, Scott, and the header of that email, kind of reinforcing." — Jake Madrigal [07:20 - 08:53]

On Customer Feedback: "Always getting that feedback from your customer is key. Whether it's feedback on campaigns specifically or whether it's just feedback on the loyalty program itself." — Jake Madrigal [25:16 - 27:23]

TRANSCRIPT

Amber Collins [0:08 - 0:41]:	Hey everybody. Welcome to CX Anonymous, the series where we provide tactical advice on successfully executing customer experience. We don't care who you work for, just how it got done. I'm your host, Amber Collins, product marketing manager with Scott Sherson, product solutions director and a host of guests for our second season. Today we're joined by Jake Magical, head of customer success here at Annex Cloud. Welcome, Jake. We're so happy to have you. Why don't you tell us a little bit about your role and where you get involved with the clients and.
Jake Madrigal [0:41 - 1:15]:	Yeah, so right now I'm the head of customer success at Annex Cloud. I've been working within the loyalty space and for Annex Cloud specifically twelve years now. So I've been around for a while and have been here to help a number of our clients get up and running with their loyalty program, as well as help provide best practices and strategy to get the most out of their loyalty program. So the customer success team is really kind of there holding the hand of the client once they go live to really get the most of their experience with annex cloud and their loyalty program itself.
Amber Collins [1:15 - 2:05]:	Yeah, I mean, so essentially you are in the thick of loyalty program and campaign and helping our customers take advantage of our innovations. And I've heard you called a strategic offer for our clients and just the experience that you bring back to my team in marketing. I'm constantly impressed with the knowledge that you bring and some people may recognize you as participating in our virtual loyalty lounges, our monthly series that we've started that are just a very intimate conversation about loyalty and what we're seeing in the marketplace and what's working for our clients. So I believe that Scott can agree that your role is extremely important to help our clients mitigate risk and churn and execute loyalty to the best of the industry, to be innovative, to take advantage of our technology.
Jake Madrigal [2:06 - 2:22]:	That's great. Yeah. And I think the loyalty lounge has been a great addition for our clients. Just a safe space to kind of talk about what they're seeing with their program, maybe looking for

different recommendations. So if you haven't checked out the loyalty lounge, I definitely advise you to take part of that the next time we have that.

Amber Collins [2:22 - 2:52]: I love having those. So today I would love to dive into some lessons you've learned having supported so many programs. I'm talking across industries, I'm talking across types, member types, countries, regions, just brands. I know you've done it all, so let's jump in. I would love to start by differentiating when we say a marketing campaign and a loyalty campaign and how do you define that and how do you coach your clients? Through knowing the difference between the two.

Jake Madrigal [2:53 - 4:59]: Yeah. And I think for our clients, specifically, what we talk about when a client is preparing for the launch of a program is some of those core marketing emails or marketing campaigns that you should have as part of your everyday strategy. So those would be things like a welcome email for the program when you join the program, when you enroll in the program, I mean to start an announcement email for the program kind of going through what does this program offer, what are the benefits to a customer? And then some of the other common kind of recurring, I guess you could say triggered emails that should be set up as part of these loyalty programs are things like a monthly point statement. It kind of gives an overview of what tier you're at, maybe how much you need to spend or how many points you need to earn to get to the next tier, as well as some recommendations of how you can engage with the program. So some of these things like welcome emails monthly, you know, point statement emails, announcement emails for the program, or even something like an expiration email telling you how many points you have for expiration. Those are some of the core marketing campaign emails, I guess you could say, as part of the program loyalty campaigns. Those are kind of utilizing the program, utilizing the software and the solutions that we provide around segmentation and campaign functionality to drive a specific goal. Right. So let's say, for example, a client's kind of in a slow period and they want to increase sales or increase conversion or just increase engagement of their audience during that timeframe, that's where you would utilize a loyalty campaign. And that might be something like a double point or a triple point event for that example. Right. And those campaigns can be much more in depth, can be much more segmented from that perspective. But just in general, when it comes to thinking standard marketing, emails, marketing campaigns for loyalty, or kind of a focused loyalty campaign on maybe a segment or a core group of products, that's a little bit of the difference between those two, if that makes sense.

Amber Collins [4:59 - 5:01]: That makes a lot of sense when.

Scott Shurson [5:01 - 6:12]: I'm usually talking with people in pre sales and what is the difference and why do we need a loyalty platform? A lot of times I'm getting marketers who are new to loyalty as well and I'm taking them out of kind of a headspace of marketing communication. So a lot of things that you're talking about that have, like get to know you know more about the program, get to know you know about this. But marketing campaigns that I see are typically focused around time of day, day of week, individualized conversations, maybe playing with some verbiage or some like the title of a communication, stuff like that. So I look at marketing conversations as, just tell me about the brand. Tell me like who you are versus loyalty. As you very succinctly said, I'm trying to change a behavior. I'm trying to change a loyalty behavior. People I know are more likely to change behaviors because they've signed up for, because they are my most loyal customer. So I differentiate in between those two. Do you see that you have a lot of those conversations, or when they come to you, they already have made that distinction between the two, and you can just really focus on behavioral.

Jake Madrigal [6:12 - 6:55]: Yeah, I think once they've gone live, right. They've done a lot of that core work upfront during the implementation of planning, the kind of ongoing communication strategy. So once a client has gone live, once their program's in production, as we call it, and is out there for the audience to see, that's where the focus becomes much more targeted on what types of behaviors can we influence, what types of goals can we drive with loyalty? Right. And that's where it becomes much more focused on, as we call it, refer to it, the loyalty campaign strategy, where you can get very deep into very segmented and specific audiences that you're trying to drive a specific behavior or trying to influence a specific goal with that loyalty campaign.

Scott Shurson [6:56 - 7:19]: See a lot of the customers trying to do like a breadcrumb of loyalty within most of their communications, wherever, they're always putting your point balance in it, even if they're just telling you about a new product line or something like that, just to kind of keep referring, or do we not see that? Would you prefer that they did do that to kind of like, keep, you know, loyalty top of mind? How do you take, take a look at those.

Jake Madrigal [7:20 - 8:53]: Yeah, I think from daily communication. Right? Like that's the bread and butter is, is we really advise clients to overexpose loyalty from that perspective. Right. So when a customer's opening a normal email communication, then just might be, hey, we have a sale or we have a new product, whatever that may be in the header, like you're mentioning, Scott, and the header of that email, kind of reinforcing. These are how many points you have. This is what tier you're in. Maybe this is how many dollars, if you're offering discounts within your program, if you're offering a kind of point to currency conversion, how many dollars your points are worth, put that front and center in that program or in that marketing email. So they can always see where they're at with loyalty, even if the core message of that email isn't focused directly around loyalty. So I think that's some of that bread and butter that we talk about upfront during the implementation is these are the best practices that you should evaluate now so that once we go live, we're really working on kind of how do we move the needle, how do we change that behavior, how do we influence that behavior? But of course, yeah. Overexposure across the board, whether that's in your email communication, whether that's just when a customer logs into their account and in the header of the site, they can see how many points I have, what tier I'm in, how much I need to get to get to the next tier, what those benefits might be for me because I'm in that higher tier. I think those are all very important call to actions to have kind of across the communication experience.

Scott Shurson [8:54 - 8:58]: Yeah. It really reflects a culture of loyalty rather than an initiative of loyalty.

Jake Madrigal [8:58 - 8:59]: Oh, totally.

Scott Shurson [8:59 - 8:59]: Yeah.

Jake Madrigal [8:59 - 9:31]: I think the worst thing in a program is when you don't know where you're at, you don't know how many points you have. You're getting marketing emails, they're saying, hey, come buy this product. I'm part of this program. I have no idea where I'm at. I don't know how many points have, I don't know what those points mean in terms of what the reward value is. Right. So I think what you're referring to is having that communication, having that exposure to the program, whether it's in emails and SMS communication, even on site, during that customer experience of Shopify.

Amber Collins [9:31 - 9:32]: Absolutely.

Jake Madrigal [9:32 - 10:11]: Very important. Right. I think one of the biggest things we see as a best practice is at the cart. So when you're getting to the cart through your shopping experience, being able to see how many points is this purchase going to get me and what are those points amount to? And if I have points, I want to be able to easily apply them at checkout at the cart. Right. And do that conversion right there so I can apply my discount quick and easily. So just over communication of your status within the program, whether that's an email and text and kind of just your browsing experience are all very key, today's success of the program.

Amber Collins [10:12 - 11:36]: All right, so once you've got that, let's call it integrated or omnichannel loyalty strategy and all of those customer touch points, that is honestly, like you said, bread and butter or table steaks, are just like, this is the customer journey. And we've identified all of the opportunities to insert loyalty into these touch points and communications, including empowering your frontline sales associates and, you know, integrating to the pos, which we hope all of our clients have done through the implementation. Now you're ready to build on those tent poll campaigns or even annual campaigns. You know, I know that we've talked about a few examples of annual campaigns, but all of those things that are start to go into surprise and delight and create a sense of urgency and scarcity and really go above and beyond. Just, oh, you're here now. And then we say, look at this shiny object that we got for you, specifically for you, because we're all about personalization. So when we're planning these new tent poll campaigns and these new annual campaigns that are pure loyalty plays, which of course, is never just loyalty because it includes a lot of other stakeholders to get these things off the ground, what questions should those program managers ask themselves and in turn ask the rest of their organization? And what should they be asking you when they're thinking about doing the above the customer journey type of loyalty campaign?

Jake Madrigal [11:36 - 14:36]: I think the biggest thing to ask yourself as a marketer or your team that you're working with on the program is, what are we trying to influence with this campaign? What is the goal of this campaign? Right. Sometimes clients come to us and they're like, hey, we want to run campaigns, and we can do a lot of different types of campaigns with the segmentation and campaign functionality that we support. But the question back to the client is, what are we trying to drive with this campaign? What KPI are we trying to influence? What goal are we trying to drive? Right. So sometimes, for example, clients will come to us and they'll say, hey, we want a campaign that's going to drive purchases and go, okay, we can set up a campaign that'll be focused on purchases, but what specifically are we trying to drive? Are we trying to drive specific products? Are we trying to drive a category or a specific brand that you sell as a retailer?

What is it that we're trying to influence here? And we ask those questions to get deeper into the goal of this potential campaign. So at the end of the day, the conversation might lead to, hey, we have a lot of products from last year, last year's product release that we want to push out the door, but we'd love to try and push those out the door without putting them on sale. So that's a perfect example of we want to drive orders. We want to drive sales? Well, what type of sales, what type of orders do you want to drive? We want to drive this product line from last year to clear inventory, but we don't want to put it on sale. We want to try and use loyalty to influence that behavior. And that's where the CSM team, the customer success team here at Annex Cloud, will start thinking about what types of campaigns and segments support that. Right. And in this example specifically, I would tell the client, okay, well, let's run a bonus point campaign or a point multiplier campaign only on that specific segment of products. So you identify which products should be part of the point multiplier, part of the bonus campaign. You provide that product information to annex Cloud. Annex Cloud will create and build a segment of those products. And then we'll tie that segment to a specific campaign that says, hey, if anyone purchases during this weekend and they purchase one of these products or multiple of these products, you're going to earn triple the amount of points or you're going to earn 500 bonus points from that example. And if you want to take it a step further, you can even say, hey, we want them to purchase this set of products or one of these products, but we want them to spend over dollar 300 before they get a bonus. So now you can even customize that segment further and say, if they purchase one of these products, but if they also spend over an order value of $300, then give them this bonus or then give them triple points on those specific products. So we want to understand the goals. We want to understand what are we trying to achieve with this campaign and then get as specific as possible to hit that goal and to reach that goal. And that's just one example of how we might have that conversation with a client.

Amber Collins [14:37 - 15:42]: So there's an example of a client that I do believe it came from you or team. And as a marketer who is in product. So I'm close to sales. We could say all day that the biggest KPI is sales, sales, sales. Right. But the thing that I love about loyalty and the way that we can influence behavior is the story that I was told about the client that wanted to garner reviews and ratings fast on new products because that built the credibility and the authority of that product. And they used loyalty to reward these super reviewers. And therefore that new product looked so lived in on their website and when you went and shopped on Google for them and it just, it just stood that product up so quickly by a group of trusted customers. And so that as a KPI to build trust in the marketplace through reviews and ratings is a KPI that I love that we can affect with loyalty. And I know, Scott, you've got some other ways that we can influence action with loyalty.

Scott Shurson [15:43 - 16:10]: Well, I do, but really my question for Jake is we know that somebody coming to a company like ours, they're moving beyond a simple transactional loyalty scheme. Want to do something a little bit more interactive and behavioral. Do you find that there are some behaviors are easier than others or some that are almost unattainable that are kind of, you know, golden gooses or unfliable airplanes?

Amber Collins [16:10 - 16:10]: Good point.

Jake Madrigal [16:11 - 18:43]: I think it really depends on the behavior you're trying to influence. Right. But specifically with our, our actions that we provide support on. So with our programs, clients have the ability to provide points or influence things like reviews, like signing up for emails or sms messages, filling out a customer profile, a load of other things, including purchases. Right. And I think the biggest thing to keep in mind is whatever you're trying to get the customer to do, whatever behavior you're trying to get them to complete, the juice has to be worth the squeeze. So whatever you're offering needs to be substantial enough to move the needle to push that customer through to completion of that behavior. Some of the things that we've seen actually customers respond better to than we expected were things like filling out a profile. We had a client in the beauty space who had what they called their beauty for profile, I think is what the derm was that they used. And they asked people to come back and provide about answers to 20 different questions on demographic information, personal information. What age are you? What race are you? What gender are you? What are you looking for in our products? Are you looking to use products for your eyes, for your face, for your skin, for anti aging? What is it that you're interested in? And it was a pretty lengthy questionnaire, and it was one that I thought we're not going to get a lot of response back on this because they're asking so much. But what we found was, one, the bonus we were giving was worth it to the customer, and two, the benefits of filling that out are much more personalized marketing, much more personalized recommendations in terms of product recommendations. So to the customer, we actually saw a great response rate. We saw customers coming back filling it out because they thought the bonus was worth it. And we saw that on the tail end of that. When you were able to use that content, that zero party data for remarketing, we saw much higher conversion rates coming off the back of those marketing campaigns. So all in all to the customer, to the business itself, the juice was worth a squeeze in that example, right. So I think that's a good example. And keeping in mind really is you have to make it worth it to the customer. At the end of the day, we can't just tell them, hey, come fill this out because we've learned that doesn't work. Using loyalty as a way to generate reviews, generate reviews quicker, stronger, faster, that's something that actually works and that we've seen work time and time again.

Amber Collins [18:44 - 19:21]: Can I ask with that beauty client, when people say survey, they're thinking about this long one page, hundred fields, whatever the number, and it's just going on and going, going. Now can I ask in that situation, how interactive was that survey? Had they utilized game any gamification to, I don't know, just juju that experience? Because of course we thought that it was going to be a bit of a heavy lift for, for people because who likes filling out this endless profile? So talk to me a little bit about the actual user experience on that survey.

Jake Madrigal [19:21 - 20:39]: Yeah, I mean, I think step one, don't call it a survey because if you call it a survey, even in marketing communication, like me as a customer, like, yeah, I'm not filling that out. That's going to take forever. Right. So they called it like coming back and filling out your beauty profile, right. And your beauty profile preference center or whatever it might be. And to customers, when they came back, they started seeing questions that, you know, were, hey, this is going to, you know, there's relevant information that's going to get me better product recommendations at the end of the day. And at the same time in terms of the customer experience, I think one thing they did really great with the presentation of this profile and this questionnaire was they broke it out. So you'd have the first page with maybe four or five questions, you'd click next and then you get to a second page with maybe four or five questions. So on page load it doesn't look like I have to fill out 30 different questions and it doesn't look so daunting. Right. They cut it down, broke it down. So that looked a little bit palatable to the customer just on the initial page load from that perspective. So I think that's a great learning is don't put everything on one endless scrolling page, right. Have it paginated, have it chopped up to where you're answering certain sections at a time. And I think that will really get to a higher submission rate, conversion rate at the end of the day.

Amber Collins [20:39 - 21:57]: Yeah, I think also being able to sort of save and come back later, this progressive profiling over time that, hey, they completed 50% of it, but if we can get them to come back again, let's get the other 25% of the information. We can get them to come back again because they're a loyalty member, so we know what they like. We can get the rest of the 25% of information and having a realistic completion rate. It's also important when we talk about that golden goose, like those unrealistic sort of, you can't stuff everything into one campaign and being able to take those, like you said, in consumable bite sized chunks. So I just love that annex cloud allows these profiles to be built over time, when the customer has time, when the customer's motivated to share the information, when the customer feels like they've gotten value or will receive value from it, instead of just like locking them into the age old, you're at the cash register and they're like, do you want a credit card? Fill out this whole sheet of paper while everybody looks at you like, what are you doing? So just easing that friction, meeting the customer where they are, you know who they are, they're a loyalty member so you can get back to them. And just understanding human behavior in situations like that. I love that, that our technology helps these program managers meet their customers where they are in their journey.

Jake Madrigal [21:58 - 22:27]: Yeah. And I think, you know, generating zero party data is something we're all trying to do right now. And if that's an action within your program, you have this benefit of having a loyalty program to try and drive and influence that kind of response from the customer. So at a time where zero party data is very important to get for personalization, for segmentation, having that as part of your loyalty program really gives you the ability to drive that collection.

Amber Collins [22:29 - 22:44]: Yeah. And you want them to be with you for a long time. So what is the biggest risk to a new campaign and how do you prevent it? And if it does happen to happen, how do you help our clients clean it up?

Jake Madrigal [22:45 - 24:31]: I think when anyone's launching a campaign, the biggest risk to think about is this going to work as intended. Right. So I think the preparation and the development setup and the testing of the campaign is very important to running a successful campaign. Right. So you want to have all your use cases, cases tested. You want to have all of those use cases identified upfront so we know what to look out for. And then go through a detailed kind of testing plan for that campaign to make sure it's going to function properly. We have the ability to do all of this in an isolated environment, in annex cloud, we have our development environment and our production environment. So it gives us that ability with many other clients and vendors to kind of test everything thoroughly in Dev before you kind of release it out to production to the audience. And then some people might consider the other risk to be like, is anyone going to engage with this? Right. And I think that's where, from a marketer's perspective, you want to make sure you have all your touch points kind of identified. So we want to have communication about this campaign on the website up front and center. If it's all customers, they should see that this is running on the homepage. When you log in, you want to have it maybe in the account section if it's a segment campaign for only a certain amount of users. Right. You want to have communication via email, via SMS, across social media channels. If you have a social media presence, you know, put that out there on your Instagram Stories, on TikTok or whatever social media page you're utilizing for that communication to customers. So I think just, you know, cross all your t's, dot all your is make sure that everything's kind of out there and everything's planned for to kind of alleviate some of that, the risk there.

Amber Collins [24:33 - 25:15]: Of course, with our advanced segmentation, it's really up to the program to decide if the one that's going to the very highest value of customers is this exclusive offer and say that. Say that it's an exclusive just for you, but also be prepared to address any concerns and feedback that come back from that. So what would you suggest? How do you help your clients be prepared for member concerns and feedback about particular campaigns? Obviously, we don't decide the wording or anything like that, but how can they use the platform to help address those concerns and garner feedback?

Jake Madrigal [25:16 - 27:23]: I think garnering feedback, that's one key takeaway, is to reach out to your customers after running campaigns or maybe after six months of running campaigns to get their feedback on what we're doing with this program. So I know clients who have very good experiences with reaching out to customers just on their loyalty program in general or on campaigns specifically, and asking customers for responses and asking customers to feedback. And this is a little bit more of a survey where you're saying, hey, we'd love to hear your thoughts about our loyalty program. We'd love to hear your thoughts about the campaigns we've been running. And do they include things that you find are useful? Do they include things that you find are beneficial or are these things that are influencing you to engage more within our program? And if they're nothing, what could we be doing better? Do we need better rewards? Do we need better offerings? Are the bonuses you're receiving not good enough? Like, do you feel like you're not getting enough from this program? And when our clients have gone directly to the customer and asked them to fill out these surveys and ask them to answer these questions, it's really given us a wealth of knowledge that we can then use to go back to the table, go back to the drawing board, and make effective changes to the program that might be necessary from that perspective. In other cases, we say, hey, we love this type of campaign. Do this one more. We want to see more of that type of campaign. And that a lot of times is the campaigns that we see the highest engagement on. So I think always getting that feedback from your customer is key. Whether it's feedback on campaigns specifically or whether it's just feedback on the loyalty program itself, I think it's really helpful to do this once a year, going out to your audience at least once a year, going out to your audience and seeing what we could be doing better, seeing what we could be supporting more. And you don't need to go to everyone, right? You can pull a segment of maybe the top 10% of customers that engage with the program the most, and maybe a segment of the lowest 10% of customers that haven't engaged that much and go out to both of those groups and say, what are we doing good? What could we be doing better? I think it's a really beneficial at.

Scott Shurson [27:23 - 27:56]: The b two b, who's interfacing with the customer themselves on a daily basis. On a weekly basis, whatever. I see, because they're often the ones that are informing you for a lot of these things. Hey, there's a double points campaign. Hey, there's a bonus on this. Or they're that frontline. I see them as such an underutilized channel. How often or what percentage, anecdotally, would you say our customers are actually using that channel for that feedback versus just kind of doing finger of the wind or, you know, annual survey kind of stuff?

Jake Madrigal [27:57 - 29:31]: I mean, I think for our clients that have that omnichannel experience with brick and mortar locations, like, they have a definite benefit to having boots on the ground and being able to interact one on one with the customers during the purchase experience, when they might be utilizing rewards, when they might be engaging with the program. So I think they definitely have a leg up on kind of getting that feedback from the customer, and it can be very, very important, very beneficial. Right. We had a client who told us just the other day that, hey, our reps at the store have indicated that customers want a more seamless experience when it comes to redemption in store. Right. So how can we improve on that if you don't have that brick and mortar location, if you don't have those boots on the ground? I think utilizing your customer service team, who might be fielding calls and emails is also a great idea. A lot of times, I think some of our clients or some people who are running loyalty programs write off that feedback from customer service, and it's more of just like, how do we lower the frustration of this user as quick as possible? Oh, they're claiming that they didn't get points for something, or they're claiming that they had experience. Well, let's just throw some points at them and let's hope that goes away. Whereas if you're actually documenting the feedback that's coming in through those channels, just like you're doing in store, you can really get to the bottom of maybe what the pain points are for the users. So I think, Scott, it's, you know, just like you're saying, it's very important to kind of look at those channels for feedback of the customers and see how we can make some optimizations and some improvements.

Scott Shurson [29:31 - 30:08]: And it's really not just brick and mortar. Right. It's like anybody where you have somebody that is having that ongoing dialogue, totally part of normal operations, whether that's b two b, your sales reps, you know, somebody at like, a distribution channel, somebody that's, you know, having that facetime or virtual time with them. Those are the, like, highly underutilized and they have wealth of knowledge. And in my, you know, interview with a lot of them, they're screaming to give that to you, to the marketer, like, hey, I have this, you know, tap me on the shoulder. I'd love to chat with you about this.

Jake Madrigal [30:08 - 30:46]: Yeah. And I think, look, that, I mean, you're right. You know, you're hitting it right on the head. I mean, a lot of the people who monitor the social media pages, too, the comments section of some of these things, when you run a campaign, have great feedback from the customers of what to do differently next time or what they might want to see more. And sometimes those comment sections go completely disregarded. Right. But there can be a load of information in there, whether it's good or bad. It can be very knowledgeable. Feedback from your users of what they're experiencing and what they're expecting. So I think those are other areas as well to look for that feed quality feedback from your users.

Amber Collins [30:47 - 31:50]: Absolutely. So we've talked before about how loyalty data needs its translator. Sometimes that's the barrier to getting those insights across the organization. And we all know here in this room how powerful loyalty data is. It's complete, it's accurate, it's unified to a single profile. They're self identifying across the channels. I mean, it's some of the best first and zero party data that you can get. But sometimes it does need a translator to get those insights to the rest of the organization. I like what we just talked about though, is that it works both ways, because the information that might not be accessible to the marketer that is happening in customer service and customer support may need that translation of the collaboration. Sometimes it's just literally collaboration. A monthly sync on what the two teams are hearing can optimize both teams. I mean, I just love the power of this customer data that we get. So with that, my last question for you, Jake, is, in a perfect world, how should clients utilize your team?

Jake Madrigal [31:50 - 33:21]: In a perfect world? I mean, come to us with questions. Come to us with recommendations, right? What should we be doing?

Come to us with your goals so we can look at those goals and kind of analyze what we need to be doing better and how we can reach those goals. Right. We're here with that, you know, wealth of knowledge from our experience, from my twelve years doing this to help you to make your experience better, to make your program better, to overall make your customers experience better at the end of the day. So I always tell my clients, like, look, I'm an open door, come to me with any questions you have, come to me with any issues you're seeing, if you're having trouble analyzing reports and kind of want to know where to look in the right places for the KPI's you should be focusing on, come to me with those questions. So we're really here, Amber, to be used as kind of open door office hours, wherever you need it, wherever you need it, and for kind of whatever topic, right? If it's communications for on site CTA's, if it's, what types of campaigns should I be running, what types of KPI's should I be focusing on for my program? How do I look at data year over year? Once you have had a program that's been live for a number of years, we're able to help with all of these things. So I always say I'm an open door. Come to me with whatever it is you need. Come to me with whatever issues you're having or whatever pain points you see the customers having. And we can identify how to improve on those.

Scott Shurson [33:21 - 33:31]: So is there a minimum amount of time between those conversations that you, that you see, or is it really just kind of like, come to me whenever you want?

Jake Madrigal [33:31 - 34:08]: I mean, the door is open whenever you want. We like to engage with our clients weekly. I like to say with clients, when we start working with them, we are not like a lot of vendors where you might talk to your customer success manager once or twice a year or once a quarter just to get a quarterly update. We are in communication consistently. We're an extension of your team. Right. Like, I have weekly meetings with a number of my clients going over these best practices week over week over week, so we can see how we're doing and where we could be doing better. Right. So the door is always open, but I'd like to have you in the room at least once a week from that perspective.

Amber Collins [34:09 - 35:34]: Love that. So this has been such a wonderful session with you, Jake, like I said, always impressed with the knowledge that you have in this space and just the depth and the breadth of your experience. So as we always end the show with our takeaways, a couple that I got was just the reinforcement that loyalty equals action, and it influences behavior. And you have to be very clear on what that action is that you want the customer to take. But you also have to be realistic in your campaign goal and understand that this is a value exchange. And the difference between loyalty and simply just having a customer interaction is that exchange of value between the two and then get feedback. Because loyalty doesn't happen in a vacuum, and not only in a vacuum of just the program manager without the customers, but also not in a vacuum of the program manager without customer support, without perhaps merchandising, without e.com, without email comms, that just loyalty in general, it doesn't happen in a vacuum. We talked before in the episode with Alex about a company culture of loyalty. And I think that you explaining how campaigns get executed just reinforced that this is much, to an extent, a company effort in a lot of different ways. And so those are my takeaways. What you got for us, Scott?

Scott Shurson [35:35 - 36:53]: For me, it was the story of the survey, right? The ability to have something flexible where you can try new things out. But because everybody approaches loyalty and marketing with a certain set of biases, what works for me doesn't necessarily work for everybody. That I'm speaking to. So when you're in your story, yeah, I don't know if the survey is going to work, but it blew up and it took advantage of somebody of the member base was just dying to tell and give more in order so that they can get more. So being able to flexibly approach that, but kind of take yourself out of that and try something new with maybe a low to moderate risk of what if this doesn't work out perfectly? Well, then we'll try something else. This is not a set it and forget it kind of thing. So I kind of took that away from this conversation. Try some stuff out, take yourself out of the mix and you know, put, you know, let's see what works. But, you know, obviously the CS team knows what might not work because of, you know, all of this experience, you know, twelve years for you, you know, years and years for members of your team, et cetera. So there's some guidance. But again, try, you never know.

Jake Madrigal [36:53 - 36:54]: Yeah.

Scott Shurson [36:54 - 37:00]: So now, Jake, your turn. What did you take away or what do you want people to take away from this conversation?

Jake Madrigal [37:00 - 38:26]: What you can take away of this conversation is like you said, Scott, you have to be willing to try different things throughout the lifetime of your program, and your program is going to change as it ages. You might have actions that come down because they're not as much engaged by the audience. You might have actions that go in because they meet other goals and they drive other goals. So I think you have to be willing to change when it comes to your, you know, your stance on loyalty. And you have to be willing to try new things and you have to be willing to try new things consistently. And sometimes that's easier said than done because a lot of these things are not just a configuration change in the back end and your campaign's up and running. You have to have the marketing team involved. Sometimes you have to have the advertising team involved or the PR team involved to get content for the marketing campaign. So like you said, there's a lot of pieces to the puzzle that are always moving here. And you gotta be willing to kind of work as a company together, as a team together to get the most out of your program, because when your program is firing on all pistons, you're seeing some great results from that perspective, but you don't get there unless you try things. So I think you always got to be keep trying. Not everything is going to work the first time. Try and try again. Change your approach in terms of how you communicated something. Change your approach in terms of what that campaign was, what the bonus was, and you'll get there in the long run. And we're here to help you with that.

Amber Collins [38:27 - 38:53]: Absolutely. I always say marketing, but I'm going to expand it because obviously, this is the CX anonymous conversation. Customer experience is an experiment. You know, it's, it's, you can use your past data, but you're never going to get to that next level if you don't try. Just like you said, Jake. So I appreciate the conversation here today. Jake, Scott. And to our guests, we'll see you on the next ex anonymous episode. Till then, let's go out there and execute some loyalty.

Jake Madrigal [38:53 - 38:55]: Have a good one, guys. Thanks for having me.