

Is your loyalty program limiting growth or accelerating it?

Take this simple assessment to identify potential gaps, limitations and areas for improvement.



INSTRUCTIONS: Select Yes or No for each of the following statements as they relate to your current loyalty program and platform capabilities. Then get your score.

Strategy & Performance

	YES	NO
Building customer loyalty is a company-wide focus and priority		
Our loyalty program strategy is an essential part of our overall growth plan		
Our loyalty program has clear performance goals that align with our business goals		
Our loyalty program helps us accomplish our five core loyalty metrics: acquisition, spend, retention, advocacy and data collection		
We leverage loyalty data to improve forecasts and identify which investments will have the greatest impact		
We can quickly & easily identify which investments (members, promotions, rewards, etc.) will have the greatest impact on growth & revenue		
We can quickly & easily identify how improvements and changes in member behaviors translate into incremental revenue		
TOTAL YES		

Program Design

	YES	NO
We've identified & prioritized the high-impact moments where we can deliver unique, value-based interactions		
We've clearly identified the transactional and non-transactional behaviors we want to recognize, incentivize and reward across our entire customer journey		
We've identified where/how our loyalty program can stimulate/incentivize/reinforce desired behaviors at each stage of the customer journey		
We've identified the type of loyalty program best suited for our company/brand/industry		
TOTAL YES		

Data & Platform

YES NO

Our platform easily supports unlimited growth		
We clearly understand our member preferences and values		
We can collect data beyond demographics (name, email, etc.) and purchases, including unlimited customer attributes		
We can easily configure custom, granular customer segment on any combination of attributes		
We can easily run targeted promotions and campaigns on custom segments		
We can easily create different rules for different members (i.e. vary how individual groups or segments earn points, or when those points expire)		
We can easily select and rank key customer segments to find our best customers, biggest spenders, newest customers and those ready to churn		
We continually collect additional data about members to complete their profiles and identify changing preferences		
We can dynamically configure an infinite combination of controls for points, tiers, actions, rewards and campaigns		
We can easily re-configure/update our platform without development or paying for additional services		
We can view and manage programs by brand, region or enterprise-wide		
TOTAL YES		

Personalization & Experience

YES NO


Our program is easy to join and participate in		
All business teams can access and fully leverage complete, consistent member data to personalize interactions and communications		
Members are onboarded, so they clearly understand the program rules and features		
Members are rewarded as soon as they sign up		
We can easily customize our loyalty program for individual brands, regions, languages and currencies		
We can quickly create and modify customer segments to execute targeted campaigns		
We can easily test different offers and rewards, quickly see what is/isn't resonating, and adapt		
Our members have fun ways to interact and engage with the program		
We use our in-depth, unique knowledge about our members as a differentiator to improve retention		
Members can provide feedback (surveys, polls, etc.) to shape their experience based on their preferences		
Members receive value day one and get continual reminders of our program's value		
We make it clear to members what they can earn and how		
Members receive personalized communications (emails, push notifications, in-app messages) based on individual preferences		
Members receive notifications re: how close they are to rewards and when rewards are expiring		
We can offer a wide range of rewards, including discounts, gift cards, products, experiences and more		
Members can earn & redeem rewards via all their preferred channel (ecommerce, in-store/POS, mobile)		
TOTAL YES		

Value & Relationship


YES NO

Members are rewarded for both transactional and non-transactional behaviors		
We keep our program fresh by continually updating features, offers and rewards		
Our program goes beyond behaviors to offer value that builds emotional connections (exclusivity, shared values, unique experiences, partnerships)		
TOTAL YES		

Your total score:

 0 – 14

Your program could use a major boost! You're at risk of falling behind, seriously consider elevating your technology, strategy & design.

 15 – 28

You're on the right track, but there's room for improvement. You need more flexibility and capabilities to deliver more meaningful experiences.

 29 – 40

You're killing it! Keep up the good work, you're a loyalty pro!

**The right loyalty technology can make a huge difference.
Let's explore how a SaaS-based solution can put you in the green!**