

Planning Your Shopper Loyalty Rewards Program

As convenience retailers embark into loyalty marketing, there are a number of decisions to be made that impact nearly all areas of focus within the retail organization. There is an abundance of information and insight available online on how best to market your loyalty solution. This document boils much of that information into a brief check list that Loyalink users can draw on before, during and after the initial installation of the solution.

Designing Your Loyalty Program

- ☐ Define the primary objectives, in order of importance
 - Increase Traffic
 - Increase Spending
 - Match Competitors
- ☐ List how the Loyalty program will allow you to meet those objectives
- ☐ Determine who in your company will be impacted as you work to meet the objectives:
 - Marketing
 - Operations
 - IT
 - Category Management
 - Accounting
- ☐ Decide how you will position the program with your customers
 - Rewards or Savings?
 - Thanks or Incentives?
- ☐ Develop key messages to broadcast
- ☐ Name your program

Creating Enthusiasm Among Associates

- ☐ How can employees benefit from this implementation (employee/union involvement)
- ☐ Employee training / scripting (how employees should communicate the program to shoppers)
- ☐ Employee participation/enthusiasm
- ☐ Monitoring employee participation/enthusiasm/communications
- ☐ Potential for incentives
- ☐ Potential to include as part of employee evaluation

Shopper Enrollment

How will you communicate with shoppers?

- ☐ If you want to be able to communicate directly, you'll need to get email/phone number during application or input on website
- ☐ How will you entice your customers to enroll?
- ☐ How will you promote the program?
 - Pump Toppers
 - Inside Store
 - Website
 - Advertising
 - Word of Mouth

What will be included in the membership kit?

- ☐ Pinnacle Partner, SSI, has created a program kit that includes an application, 1 standard size card and 2 key fobs with section that could be used as a 1 x coupon.
- ☐ Will you require shopper to provide personal information?
- ☐ What information will you seek?
 - Addresses allow marketing to extend Loyalty to direct marketing to shoppers based on shopper performance.
- ☐ Where will the applications and cards be displayed?
 - Some retailers choose to put application forms on counter and cards behind counter. The benefits to that are:
 - Increases possibility of collecting shopper information
 - Requires associates to engage in process
 - Reduces card waste

Shopper Support

- ☐ Who will address shopper complaints and concerns?
- ☐ How will shoppers communicate? Website, shopper support line?
- ☐ What information about shopper support and security will you broadcast on print and website material?

Shopper Rewards

- ☐ What kinds of promotions will you run initially? *It is recommended, especially during initial phase, to limit the promotions to one or two. This will allow you to focus marketing and attribute success more accurately.*

Some commonly used Loyalink Promotion options:

- Club Cards - Buy X (Count), Get X (Count) Free, Percentage Discount, Fixed Discount, Set Price
- Cross-Marketing - Buy X (Product) get X (Product) Free, Percentage Discount, Fixed Discount, Set Price
- Fuel Discounting - Inside
- Fuel Discounting - Outside
- Shopper Reward - Ticket Reduction based on Number of visits, Dollars Spent, etc.
- Store Specific Rewards
- Item Promo - Specific Item promotion

Employee Training

- ☐ Shopper Sign-up
- ☐ Step by Step for Sign-up / Activation – Form fill-out and POS
- ☐ Step by Step when Reward is issued
- ☐ What to do with something goes wrong
- ☐ What Promotions are available
- ☐ How to 'sell' the Program / Script....

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Implementation Plan

Target Dates:

- ☐ Into LAB
 - Create Promotions
 - Test Cards
 - Test in lab at POS
 - Develop Cashier Training
 - Scan and Swipe
- ☐ Revisit, Revise
- ☐ Introduce at 1 - 2 stores with company personnel testing
 - Test implementation documentation/routine
 - Install
 - Setup
 - Test Communication
 - Test Transactions
 - Buttons on POS
 - Review and Revise Training
- ☐ Revisit, Revise
- ☐ Expand membership to 'Friends of Company'
 - Seek input on promotions
 - Seek input on marketing material
- ☐ Expand to larger pilot
 - Rollout technology, confirm connectivity
 - Rollout training and program material (cards, apps, POP)
- ☐ Revisit, Revise

Card Specifications

Card Numbering Design

You can obtain an **Issuer Identification Number (IIN)** assigned to you by the American National Standards Organization. If you already have an IIN that you use for your proprietary cards you will also use it for your Loyalty cards. (A Company can only have one IIN assigned to their business.)

Once you have obtained your own IIN you will contract with a company that prints proprietary cards for businesses. They can assist you in setting up the structure of the Primary Account Numbers (PAN) used for your cards.

If you choose not to get your own INN, you can still contract with a company that prints proprietary cards for businesses. However, you must ensure that your card prefix is unique and it must not duplicate or interfere with any other registered card prefixes.

Your Marketing team can work with this company to determine the look of your Loyalty cards and the type of information they will display. For example, will you use Magstripes, Barcodes or both on the back of your cards; and will they be standard sized cards or keychain cards?

Some standard dimensions

Card: 3.375" x 2.125"

Keytags: 2"x .875"

Recommend 30 MIL high quality thickness

