



LOYALTY USE CASE:

Points & Tiers Program

Build your first Tiers Program



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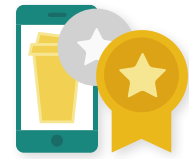
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What is a tier program?

A tier program is a type of loyalty program that provides customers with different benefits depending on the tier they're in. Tiers typically take a hierarchical structure in that customers in the lowest tier typically receive less or more limited benefits than the highest tier. For example, a tiered program could look like a "bronze, silver, or gold" membership. In order to be categorized into tiers, customers typically:

- Interact with your brand (also known as an engagement-based tier program). Customers earn points based on purchases and interactions. The more points they earn, the higher the tier they'll be categorized into.
- Pay for membership for different benefits (also known as subscription-based tier program). Customers pay to be categorized into a specific tier. The higher the tier they pay for, the more benefits they receive.

As customers join different tiers, you can provide your customers with updates to their benefits, special discounts, coupons, and invites to exclusive events!

What are the benefits of a tier program?

Similar to other loyalty programs, tier programs boost customer retention by strengthening the relationship between you and your customers. Rewards and benefits — especially exclusive ones — not only make your customers feel valued, but they also incentivize them to keep engaging with your brand to maintain access to those benefits.

Now that you're clear on the benefits of loyalty programs (specifically tier programs), let's get started with setting up your tier program. Keep reading to get a step-by-step guide on how to do so within Campaign Monitor by Marigold.

Part 1: Design your tier program

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2

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□ Step 1: Set goals for your tier program

Consider what you'll want to achieve with your loyalty program. Are you aiming to reduce customer churn, increase retention, or are you instead looking to increase the average order value?

Understand what your primary objectives are and the metrics you'll want to measure. Giving your loyalty program a north star will help you measure the success of your program.



□ Step 2: Determine how customers become part of your different tiers

As previously mentioned, there are typically two ways for customers to enter a tier program and increase their membership level:

1. Earning points through continuously purchasing your products or services or engaging with your brand
2. Paying for a subscription to a specific tier

If you decide to move forward with a points system, you'll need to decide how your customers will generate points. Some ways programs allocate points to customers are when they:

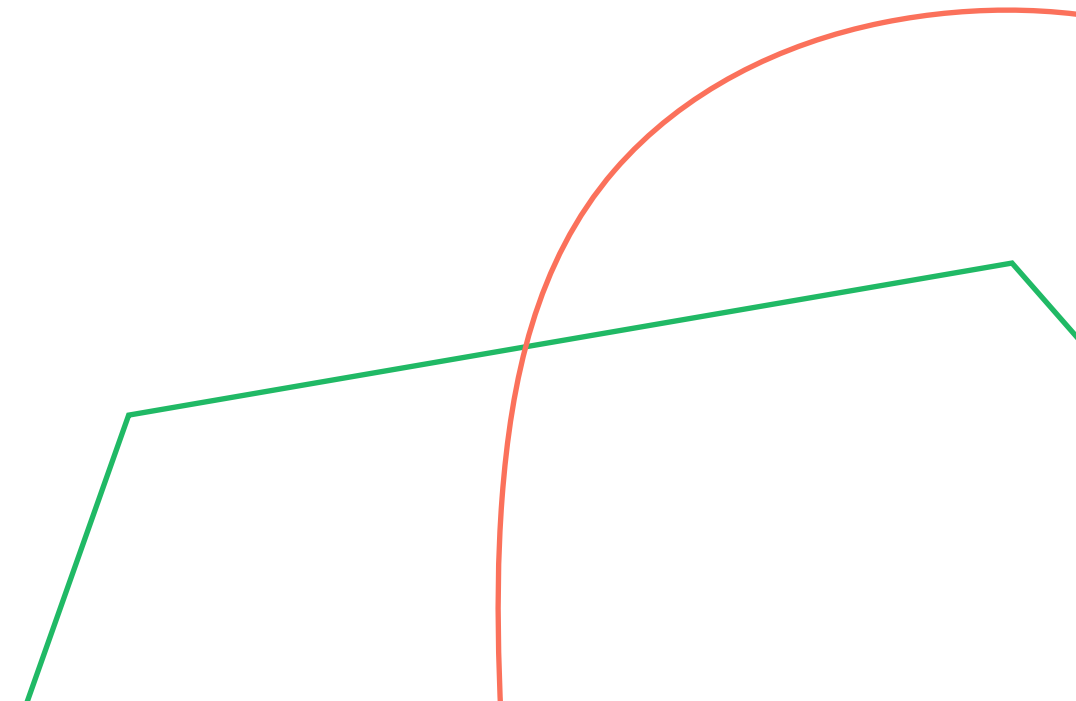
- Create their own account/sign-up bonus
- Purchase a product or service
- Spend a specific amount of money
- Share a product or article with a friend
- Interact with social media posts
- Provide a product review
- Submit answers to a poll or survey
- Refer a friend to create an account
- Refer a friend 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 that they already partake in today will prompt them to continue that behavior.

If you decide to move forward with a subscription program, you'll want to consider the following:

- How often will customers need to pay for their membership?
- How much will each membership tier cost?

You'll want to first determine how your customers become part of your loyalty program as it builds a foundation for the next steps you'll need to take.



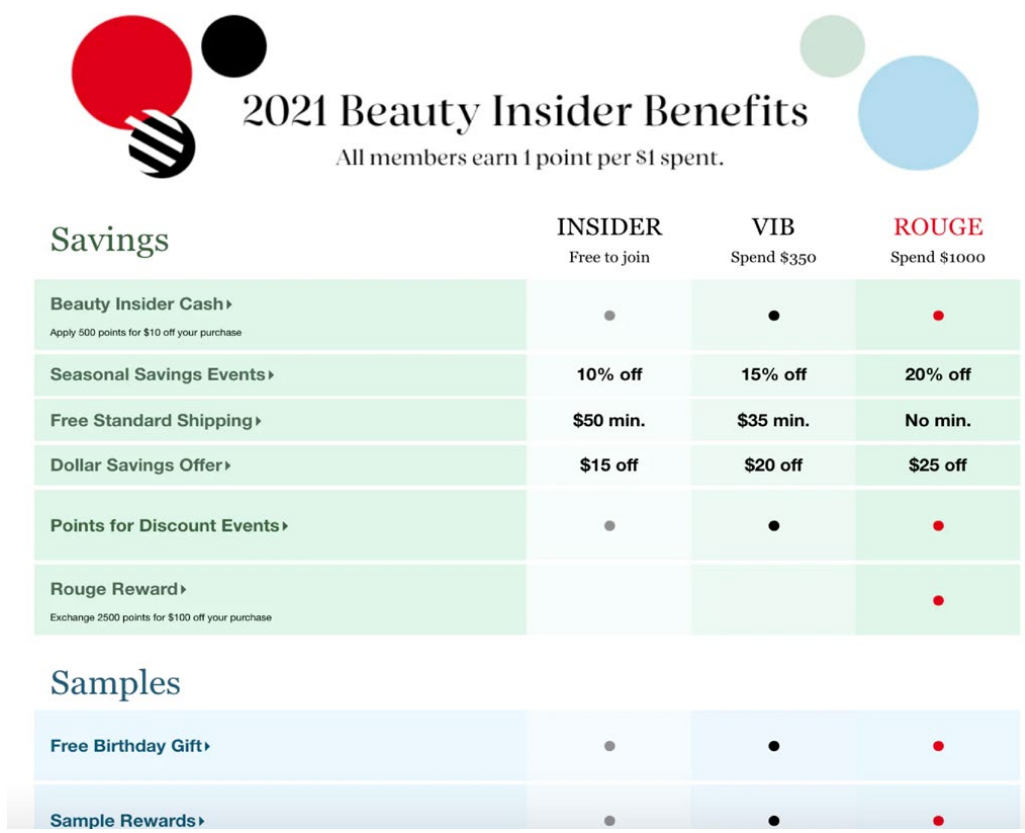
Step 3: Determine the term length of each tier

Understanding how long your customers can remain in a tier and how much time they have to accumulate points to be eligible for a tier upgrade is an important step in building a tier program.

“Tier term length” refers to the length of time your customer will keep their tier status once they enter your program or enter a specific tier. Typically you’ll find the following tier term lengths used by businesses today:

Tier Term Length	Description	Example																																												
Customer lifetime	Once a customer enters a tier, they will remain in that tier for the entire duration of their customer lifetime.	<table><tr><th></th><th>Level 1</th><th>Level 2</th><th>Level 3</th></tr><tr><th>The Benefits</th><th>Admirer</th><th>Enthusiast</th><th>Devotee</th></tr><tr><td></td><td>Free to join</td><td>\$250 Lifetime Spend</td><td>\$450 Lifetime Spend</td></tr><tr><td>Bundle & save</td><td>●</td><td>●</td><td>●</td></tr><tr><td>Shipping benefit</td><td>Free Standard over \$75</td><td>Free Standard</td><td>Free Standard + \$3 Express</td></tr><tr><td>Annual birthday gift</td><td>After first purchase</td><td>●</td><td>●</td></tr><tr><td>Free seamless underwear with purchase</td><td></td><td>●</td><td>●</td></tr><tr><td>Early access to new arrivals</td><td></td><td>●</td><td>●</td></tr><tr><td>Exclusive seasonal offers</td><td></td><td>●</td><td>●</td></tr><tr><td>Merchandise giveaways</td><td></td><td></td><td>●</td></tr><tr><td>Limited Edition product access</td><td></td><td></td><td>●</td></tr></table> ThirdLove’s loyalty program categorizes their customers into tiers based on their <i>lifetime</i> spend. These customers will keep their benefits so long as they have an account with ThirdLove.		Level 1	Level 2	Level 3	The Benefits	Admirer	Enthusiast	Devotee		Free to join	\$250 Lifetime Spend	\$450 Lifetime Spend	Bundle & save	●	●	●	Shipping benefit	Free Standard over \$75	Free Standard	Free Standard + \$3 Express	Annual birthday gift	After first purchase	●	●	Free seamless underwear with purchase		●	●	Early access to new arrivals		●	●	Exclusive seasonal offers		●	●	Merchandise giveaways			●	Limited Edition product access			●
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Free seamless underwear with purchase		●	●																																											
Early access to new arrivals		●	●																																											
Exclusive seasonal offers		●	●																																											
Merchandise giveaways			●																																											
Limited Edition product access			●																																											

Tier Term Length	Description	Example																																
Rolling year	Once a customer enters a tier, the customer will retain that tier status for the next 12 months if they do not upgrade to the next tier.	EARN MORE POINTS, UNLOCK MORE BENEFITS <table><tr><th>YOUR BENEFITS</th><th>ROSE GOLD Up to 1,999 points earned each year</th><th>GOLD Up to 6,499 points earned each year</th><th>PLATINUM 6,500+ points earned each year</th></tr><tr><td>Complimentary Shipping</td><td>On orders of \$49+</td><td>On any order</td><td>2-day on any order</td></tr><tr><td>Free Returns</td><td>•</td><td>•</td><td>•</td></tr><tr><td>Birthday Gift</td><td>20% off \$100+</td><td>20% off \$100+ & 100 bonus points</td><td>20% off \$100+ & 100 bonus points</td></tr><tr><td>Rewards Catalog Access</td><td>•</td><td>•</td><td>•</td></tr><tr><td>Anniversary Gift</td><td></td><td>•</td><td>•</td></tr><tr><td>Early Access to Sales & Launches</td><td>•</td><td>•</td><td>•</td></tr><tr><td>Exclusive Member Offers</td><td>•</td><td>•</td><td>•</td></tr></table> Lancome’s loyalty program categorizes their customers into tiers based on a rolling 12-month spend. Customers have 12 months to reach a tier and once the enter a new tier, they have 12 months to enjoy their tiers benefits.	YOUR BENEFITS	ROSE GOLD Up to 1,999 points earned each year	GOLD Up to 6,499 points earned each year	PLATINUM 6,500+ points earned each year	Complimentary Shipping	On orders of \$49+	On any order	2-day on any order	Free Returns	•	•	•	Birthday Gift	20% off \$100+	20% off \$100+ & 100 bonus points	20% off \$100+ & 100 bonus points	Rewards Catalog Access	•	•	•	Anniversary Gift		•	•	Early Access to Sales & Launches	•	•	•	Exclusive Member Offers	•	•	•
YOUR BENEFITS	ROSE GOLD Up to 1,999 points earned each year	GOLD Up to 6,499 points earned each year	PLATINUM 6,500+ points earned each year																															
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Exclusive Member Offers	•	•	•																															

Tier Term Length	Description	Example																																				
Calendar year	Once a customer enters a tier, they will retain their tier status for the remainder of the current calendar year <i>and</i> the following year.	 2021 Beauty Insider Benefits All members earn 1 point per \$1 spent. <table><tr><th></th><th>INSIDER Free to join</th><th>VIB Spend \$350</th><th>ROUGE Spend \$1000</th></tr><tr><td>Beauty Insider Cash › Apply 500 points for \$10 off your purchase</td><td>●</td><td>●</td><td>●</td></tr><tr><td>Seasonal Savings Events ›</td><td>10% off</td><td>15% off</td><td>20% off</td></tr><tr><td>Free Standard Shipping ›</td><td>\$50 min.</td><td>\$35 min.</td><td>No min.</td></tr><tr><td>Dollar Savings Offer ›</td><td>\$15 off</td><td>\$20 off</td><td>\$25 off</td></tr><tr><td>Points for Discount Events ›</td><td>●</td><td>●</td><td>●</td></tr><tr><td>Rouge Reward › Exchange 2500 points for \$100 off your purchase</td><td></td><td></td><td>●</td></tr></table> Samples <table><tr><td>Free Birthday Gift ›</td><td>●</td><td>●</td><td>●</td></tr><tr><td>Sample Rewards ›</td><td>●</td><td>●</td><td>●</td></tr></table> Sephora’s loyalty program categorizes their customers into tiers based on a calendar year spend (January 1st - December 31st). If a customer does not requalify for VIB or Rouge status, they will revert to the lowest tier.		INSIDER Free to join	VIB Spend \$350	ROUGE Spend \$1000	Beauty Insider Cash › Apply 500 points for \$10 off your purchase	●	●	●	Seasonal Savings Events ›	10% off	15% off	20% off	Free Standard Shipping ›	\$50 min.	\$35 min.	No min.	Dollar Savings Offer ›	\$15 off	\$20 off	\$25 off	Points for Discount Events ›	●	●	●	Rouge Reward › Exchange 2500 points for \$100 off your purchase			●	Free Birthday Gift ›	●	●	●	Sample Rewards ›	●	●	●
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Rouge Reward › Exchange 2500 points for \$100 off your purchase			●																																			
Free Birthday Gift ›	●	●	●																																			
Sample Rewards ›	●	●	●																																			

Select which tier term length is appropriate for your program based on how often your customers spend with you and how often they purchase your products or services.

Step 4: Identify your program’s membership tiers and their benefits

Once you’ve decided how customers can enter your loyalty program, the next step is to decide what your loyalty tiers are. Many businesses typically have a free tier to quickly drive conversions and a few others that provide increasing value. As you build your tiers, you’ll want to be sure you’re offering value at every level. Remember, customers aren’t

interested in signing up for your program — they’re interested in the benefits they’ll receive by participating in it. If the rewards provide little value to customers, there’s a likelihood that they’ll turn away from your program soon after becoming part of it. Take for example, Sephora’s loyalty program.

Beauty Insider Benefits			
All members earn 1 point per \$1 spent.			
Savings	INSIDER	VIB	ROUGE
	Free to join	Spend \$350/yr	Spend \$1000/yr
Free Standard Shipping	•	•	•
Beauty Insider Cash*	•	•	•
Seasonal Savings Events*	10% off	15% off	20% off
Point Multiplier Events*	2X points	3X points	4X points
End-of-Year Discount*	•	•	•
Access to Auto-Replenish*	•	•	•
Rouge Reward			•

Samples			
Free Birthday Gift*	5 options	6 options	6 options
Access the Rewards Bazaar*	•	•	•
Exclusive Gifts		•	•
Experiences			
Access to Same-Day Unlimited Delivery*	•	•	•
Access App Exclusives	•	•	•
Exclusive Events	•	•	•
First Access to Products			•

Different tiers will receive different rewards so the messages each tier will receive differs from each other. Building “transitional” segments in addition to segments for each tier will also give you flexibility to send messages that drive further action. In the example above, let’s say there’s a customer who’s \$100 away from becoming a VIB Rouge member. Having a transitional segment allows you to send marketing messages that drive customers to spend more to be part of a more exclusive tier and thus receive better benefits.

To keep your customers interested, some rewards you can provide include, but are not limited to:

- Exclusive access to events, contests, or products/services not typically for sale
- Birthday and anniversary gifts
- Exclusive discounts and coupons
- Free shipping
- Points multipliers

Pro tip: Give your tier levels exciting names! Incentivise customers to engage with you by giving your tiers names that reflect your business and better target your customers.

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

Now that you have the foundational strategy of your tier program, you'll want to plan how you'll market the program and introduce 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 tier 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! Create online messages that will generate high engagement. You can also promote high-value rewards to customers who spend the most. Or, take it a step further and personalize the message that appears on banners or images on your website/emails.

□ Step 6: Add your tier program to your existing terms and conditions (T&Cs)

If you don't already have existing terms and conditions for your loyalty program, you'll want to specifically call out the program's purpose, rewards, eligibility, and/or restrictions. If T&Cs already exist, you'll want to include how loyalty tiers affect those topics.

As always, 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 your FAQs or adjust an existing one to help customers with common questions**

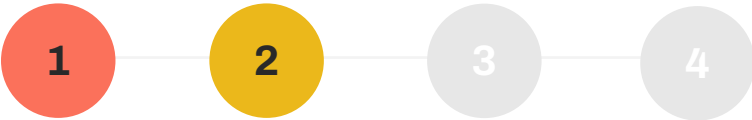
There's a high chance that you'll receive a lot of questions about your loyalty program and how tiers fit in. You'll want to anticipate your customer's concerns and provide clear instructions.

❑ **Step 8: Create automated messages**

Write messaging that customers in your loyalty program will receive. Some message examples are as follows:

- 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 tier program

Step 1: Set up your 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
Current Term Points	Number	[CurrentTermPoints]	Subscriber’s current amount of loyalty points for the tier term.
Total Points Earned	Number	[TotalPointsEarned]	Total loyalty points the subscriber has earned all time.
Tier Level	Text	[TierLevel]	Subscriber’s current tier level.
Tier Term Start	Date	[TierTermStart]	Date of when the loyalty tier term starts.
(Optional) Tier Term End	Date	[TierTermEnd]	Date of when the loyalty tier term ends.
Last Order Value	Number	[LastOrderValue]	The dollar value of the subscriber’s last order.
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 punch card stamps.
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 punch card stamps.

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 tier

Create a new segment

Segments make it easy to target certain types of subscribers in your list based on simple rules ([learn more](#)). For example, everyone that subscribed in the last month, or just males over 30.

Current Term Points

is between

0

and

99

+ OR

+ AND

Bronze Tier

Save and preview

You'll want to create a segment for each tier in your program. To create these segments, you'll want to reference the **Current Term Points** custom field and add benchmarks based on their points value. For example, if you plan on having a Bronze, Silver, and Gold tier, you'll need to create 3 segments as follows:

- Bronze Tier (Current Term Points is 0 between 99)
- Silver Tier (Current Term Points is 100 between 299)
- Gold Tier (Current Term Points is greater than or equal to 300)

Creating these segments will allow you to see how many subscribers are in each tier, and can provide indicators on how engaged subscribers are with your loyalty program. You'll be able to see which tiers are more engaged with your campaigns, how steadily each tiers grow/how incentivized your subscribers are to level up their tier.

A segment that subscribers join when their points need to be increased

Create a new segment

Segments make it easy to target certain types of subscribers in your list based on simple rules ([learn more](#)). For example, everyone that subscribed in the last month, or just males over 30.

Increase Points

matches exactly

true

⊕ OR

⊕ AND

Increase Points

Save and preview

This segment will be used to enter subscribers into a journey that increases their **Current Term Points**. Create a rule where the “**Increase Points**” custom field *matches exactly* the word “true”.

Name this segment “Increase Points”.

A segment that subscribers join when their points need to be decreased

Create a new segment

Segments make it easy to target certain types of subscribers in your list based on simple rules ([learn more](#)). For example, everyone that subscribed in the last month, or just males over 30.

Decrease Points

matches exactly

true

⊕ OR

⊕ AND

Decrease Points

Save and preview

This segment will be used to enter subscribers into a journey that decreases their **Current Term Points**. Create a rule where the “**Decrease Points**” custom field *matches exactly* the word “true”.

Name this segment “Decrease Points”.

Step 3: Initialize loyalty data in Campaign Monitor

There are currently 3 ways to populate 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.

email	name	permission to track	current term points	total points earned	tier level	tier term start	tier term end	last order value
anita@example.com	Anita Biernow	yes	0	0	Bronze	1/1/2024	12/31/2024	0
ann.t@example.com	Ann Tenor	unknown	0	0	Bronze	1/1/2024	12/31/2024	0
isla.b@example.com	Isla Bebach	no	0	0	Bronze	1/1/2024	12/31/2024	0

- 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.

Note: The **Subscriber API** requires you to pass **ConsentToTrack** for each subscriber. Be sure to include this parameter for each subscriber.

- 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 to 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”, the basic tier level, and the default term start date. Otherwise, populate these fields with the appropriate values from your existing program.

```
POST https://api.createsend.com/api/v3.3/subscribers/{listid}/import.{xml|json}

{
  "Subscribers": [
    {
      "EmailAddress": "anita@example.com",
      "Name": "Anita Biernow",
      "CustomFields": [
        { "Key": "CurrentTermPoints", "Value": "0" },
        { "Key": "TotalPointsEarned", "Value": "0" },
        { "Key": "TierLevel", "Value": "Bronze" },
        { "Key": "TermStart", "Value": "01/01/2024" },
        { "Key": "TierTermEnd", "Value": "12/31/2024" },
        { "Key": "LastOrderValue", "Value": "0.00" }
      ],
      "ConsentToTrack": "Unchanged"
    },
    {
      "EmailAddress": "ann.t@example.com",
      "Name": "Ann Tenor",
      "CustomFields": [
        { "Key": "CurrentTermPoints", "Value": "0" },
        { "Key": "TotalPointsEarned", "Value": "0" },
        { "Key": "TierLevel", "Value": "Bronze" },
        { "Key": "TermStart", "Value": "01/01/2024" },
        { "Key": "TierTermEnd", "Value": "12/31/2024" },
        { "Key": "LastOrderValue", "Value": "0.00" }
      ],
      "ConsentToTrack": "Unchanged"
    },
    {
      "EmailAddress": "isla.b@example.com",
      "Name": "Isla Bebach",
      "CustomFields": [
        { "Key": "CurrentTermPoints", "Value": "0" },
        { "Key": "TotalPointsEarned", "Value": "0" },
        { "Key": "TierLevel", "Value": "Bronze" },
        { "Key": "TermStart", "Value": "01/01/2024" },
        { "Key": "TierTermEnd", "Value": "12/31/2024" },
        { "Key": "LastOrderValue", "Value": "0.00" }
      ],
      "ConsentToTrack": "Unchanged"
    }
  ],
  "Resubscribe": true,
  "QueueSubscriptionBasedAutoResponders": false,
  "RestartSubscriptionBasedAutoresponders": false
}
```

□ **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 points balance,
(Optional) And follow up with a message confirming the action.*

or

*When a customer completes an action,
And their tier changes,
Follow up with a message confirming the action and tier change.*

In order 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, here is a list of example journeys you can build, including directions on how to set them up in Campaign Monitor:

- When a customer signs up for your loyalty program
- When a customer earns points through a purchase

- When a customer earns points through a custom action like a review
- When a customer receives a reward

Learn how to set them up in Campaign Monitor

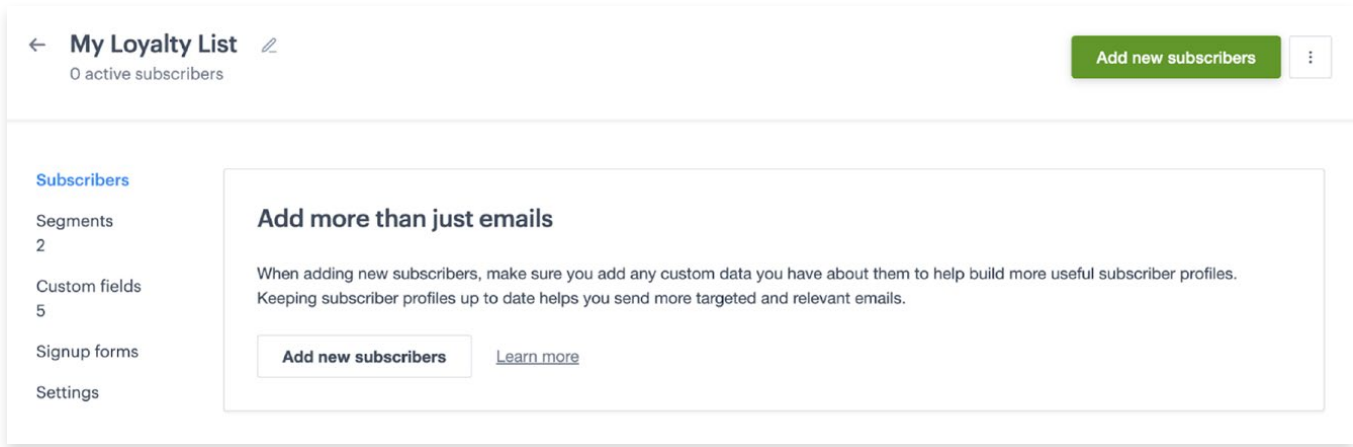
□ **Step 5: Update the “Increase Points” or “Decrease Points” custom fields to trigger automations for your subscribers**

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 **Part 2 — Step 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 **Current Term Points** if a purchase was completed. Specifically, you'll want to increase their **Current Term Points** 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



Setting “Increase Points” to TRUE for subscribers who have purchased a product or service:

- 1. When a custom completes an action that **increases** their punch card stamps, add the following information to a single spreadsheet.

email	name	last order count	increase punch card stamps
anita@example.com	Anita Biernow	10.99	TRUE
ann.t@example.com	Ann Tenor	52.99	TRUE
isla.b@example.com	Isla Beach	0	

- 2. Find your loyalty list in CM and upload your file of updated subscriber information.

Important: Be sure you are only including subscribers who need to have their **Punch Card Stamps increased** to make sure you are not giving free stamps away.

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.

Setting “Decrease Points” to TRUE for subscribers who have canceled a purchase or reservation:

- 1. When a custom completes an action that **decreases** their punch card stamps, add the following information to a single spreadsheet.

email	name	last order count	decrease punch card stamps
anita@example.com	Anita Biernow	10.99	TRUE
ann.t@example.com	Ann Tenor	52.99	TRUE
isla.b@example.com	Isla Beach	0	

- 2. Find your loyalty list in CM and upload your file of updated subscriber information.

Important: Be sure you are only including subscribers who need to have their **Punch Card Stamps decreased** to make sure you are not mistakenly taking away valid stamps from subscribers.

☐ 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 1**, those custom fields are available for you to adjust when a subscriber does an action that will increase or decrease their points.

Setting “Increase Points” to TRUE when a purchase is complete:

When a custom completes an action that **increases** their points balance, call the following endpoint and parameters:

PUT	https://api.createsend.com/api/v3.3/subscribers/{listid}.{xml json}?email={email}
<pre>{ "CustomFields": [{ // This value will be used to calculate how much to increase the subscriber's Points Balance. "Key": "LastOrderValue", "Value": "100" }, { // This value should be set to "true" if a subscriber's Points Balance need to increase. "Key": "IncreasePoints", "Value": "true" }], "ConsentToTrack": "Unchanged" }</pre>	

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.

Setting “Decrease Points” to TRUE when a purchase or reservation is canceled:

When a custom completes an action that **decreases** their points balance, call the following endpoint and parameters:

PUT	https://api.createsend.com/api/v3.3/subscribers/{listid}.{xml json}?email={email}
<pre>{ "CustomFields": [{ // This value will be used to calculate how much to decrease the subscriber's Points Balance. "Key": "LastOrderValue", "Value": "100" }, { // This value should be set to "true" if a subscriber's Points Balance need to decrease. "Key": "DecreasePoints", "Value": "true" }], "ConsentToTrack": "Unchanged" }</pre>	

❑ Method 3: Update data via Zapier integration

If you have a Zapier integration, you can easily transfer data from your app into CM! 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.

❑ Step 6: Update campaigns in Campaign Monitor to surface loyalty points

Keeping your customer informed on how many points they have or how many points they need to reach the next loyalty tier can drive your customers to purchase more products or engage more with your brand. A message that says “you need 10 more points to become a VIP member” incentivizes the customer, driving them towards a milestone or finish line!

For instructions on how to surface loyalty information in your emails, view this [article](#).

❑ Step 7: Generate campaigns in Campaign Monitor to create loyalty messages triggered in Automations

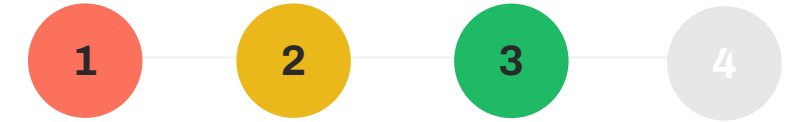
Earlier, you made plans to create automated messages that will help drive and inform customers about your loyalty program. Now is the time to create those messages! In Campaign Monitor, you can create individual campaigns based on the messages you'd like to send. Once those campaigns are created, trigger 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 customer LTV? Then track how much revenue customers within your loyalty program generate before they churn/disengage from you.

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

Part 3: Launch your tier program



□ Step 1: Train your staff members

You'll want to make sure your organization is able to support your loyalty program on all fronts. Imagine you and your teams are rowing the same boat. If your teams have conflicting directions, you'll have one team paddle in one direction and others paddling in another - you'll end up spinning your boat in circles!

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 points and tier system properly
- What the tier 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
- Tier assignment
- Tier Benefits
- Points issuance
- Points redemption (if applicable)
- Visibility and accuracy of data in reports

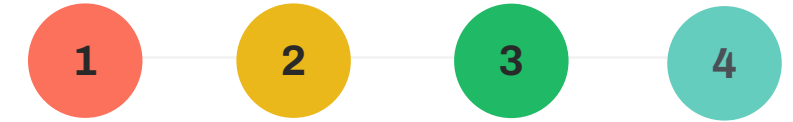
□ Step 3: (Soft) Launch!

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 segment of highly engaged customers. A soft launch ensures you can capture and quickly resolve any bugs this segment 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 tier 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 also compare the engagement of customers within the program to those who are not participating to understand if your loyalty-based campaigns and the content within them drive further opens and clicks. This will help communicate the value of the program to your stakeholders.

Pre previous steps, additional data around your program can be monitored within Google Analytics, your CRM integration, or 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 and being categorized into tiers, or other benefits of the program they're utilizing. If there are benefits or tiers 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. You'll want to create a loyalty calendar designed to refine messages to non-loyalty customers, what channels you target, and the segments you market your program to to continue driving participants. You'll also want to refine 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 to show the customer that your program is always evolving and providing constant value.

Wrap Up

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

RELATED READS

For related resources, including videos and playbooks, please click [here](#) to visit Campaign Monitor 101: Loyalty Program Series



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