Loyalty Management

*Accenture's POV on
Loyalty Management
in the Salesforce Ecosystem
for B2C and B2B clients*

> accenture

Agenda

Loyalty Management

Are your customers ready to queue for your product?

Watch the video for loyalty experiences

75% of customers prefer buying from businesses with loyalty programs

What is Loyalty Management

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Loyalty management is the strategy, tools and tactics around how a company acquires, engages and retains customers.

It helps a brand target the right audience and then provides benefits, experiences and rewards that drive long-term engagement.

# Loyalty Management Differs from Incentive Management and Gamification

Loyalty Management

- Existing customers
- Rewards for each transaction or activity
- Primary objective is to maintain a loyal customer base and boost sales
- Loyalty helps engage and retain customers

Incentive Management

- Company employees
- Rewards and perks in different forms
- Primary objective is to improve the employee's performance by encouraging specific actions
- Incentive management increases motivation and satisfaction, productivity and reduces turnover
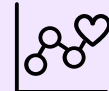
Gamification

- Existing, new customers, employees
- Rewards for completing levels, challenges, quests
- Primary objective is to engage and motivate people to achieve a goal
- Can boost engagement and motivation
- Often used as part of a loyalty program

In conclusion **Loyalty Management** focuses on increasing **customer retention and improving sales**, **Incentive Management** focuses on increasing **employee engagement and improving performance** and **Gamification** focuses on motivating towards **achieving a goal**.

B2C
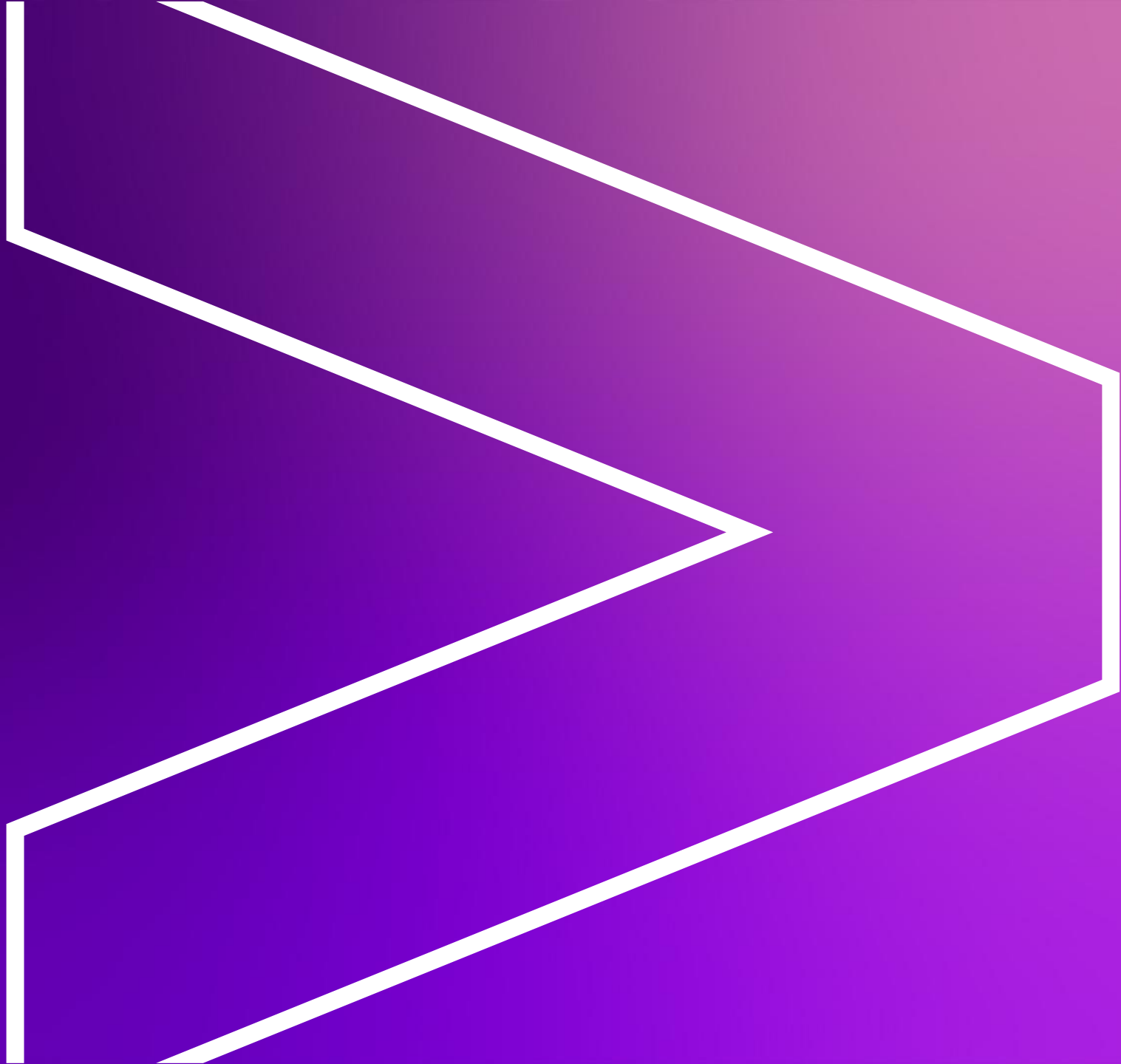
Trends Influencing the Demand for Loyalty

9

Facts Influencing the Need for Loyalty Programs

Cookies for tracking purposes are becoming increasingly restricted due to privacy concerns and changing regulations. 1st party data is becoming increasingly important.

To attract & retain Gen Z customers, use personalized experiences and rewards based on individual preferences.

Social Media & Influencer Marketing are more and more important. They drive consumer behavior, so it is crucial to reward for social media engagement and referrals.
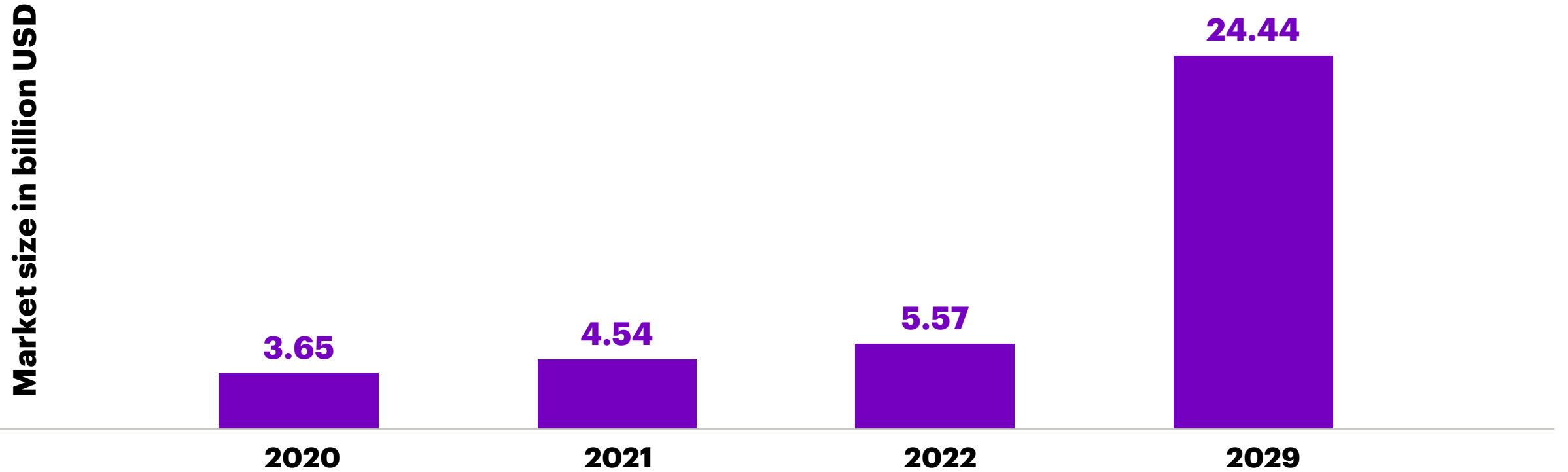
To satisfy the interest in sustainability and social responsibility, using rewards for environmentally friendly behavior or charitable donations is gaining stronger popularity.

The need for loyal customers will grow further

https://www.forbes.com/sites/forbesbusinesscouncil/2022/01/04/how-the-delayed-death-of-the-cookie-could-impact-advertisers-publishers-and-consumers/
https://www.forbes.com/sites/forbesagencycouncil/2021/05/17/gen-z-and-the-rise-of-social-commerce/
https://www.forbes.com/sites/forbesagencycouncil/2021/03/02/the-importance-of-influencer-marketing-in-the-new-normal-digital-sphere/
https://www.sciencedirect.com/science/article/pii/S0272494419303159

Loyalty Market Growth

By 2029 the market will grow 5x compared to 2022

Market size in billion USD

- 2020: 3.65
- 2021: 4.54
- 2022: 5.57
- 2029: 24.44

Key Numbers

84%
of customers are more likely to stick with a brand that offers a loyalty program

15-25%
revenue boost annually is achieved by top performing loyalty programs

>50%
of the most loyal customers actively recommend brands to others

60%
loyalty programs customers say they have better experiences with brands because their connection transcends the transactional

Why Loyalty Programs

Loyalty doesn't come easy in a world where brands constantly compete for customers' attention

Companies need to adapt and evolve to remain top of mind and give customers a reason to return

Customer acquisition cost is up to 5x higher than retention cost

Existing customers are 50% more likely to try new products & spend 31% more than new customers
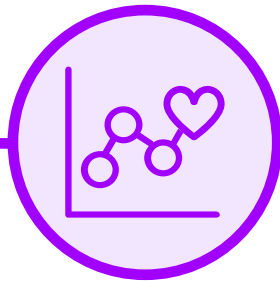
"Loyalty is one of the main assets of a brand"

Natalia Rubio, María Jesús Yagüe Guillén:Customer Loyalty and Brand Management. MDPI, Basel 2019.
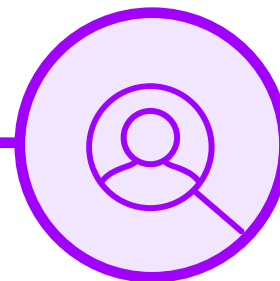
Benefits for Companies

Higher Revenue

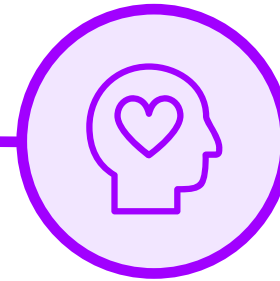**Improved Customer Retention Rate**

Repeat Purchases & Customer Referrals

Enhanced Customer Insights

Increased Customer & Brand Awareness

Improved Customer Engagement

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Benefits for Customers

Simplicity

Personalized Experiences

Exclusive Products and Services
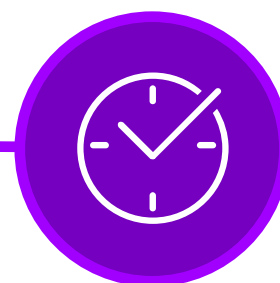
Early Access to Sales and New Products

Better Customer Service

Rewards (Including Partners)

Overall, Loyalty Programs Can Help...

Win

...**companies to build stronger relationships** with their customers, **increase revenue** and **profitability**, and **gain a competitive advantage** in their industry.

Win

... **customers** to get a **better shopping experience**, **personalized rewards** for their loyalty, **exclusive access to products and services**, and **improved customer service.**

Without Loyalty Programs...
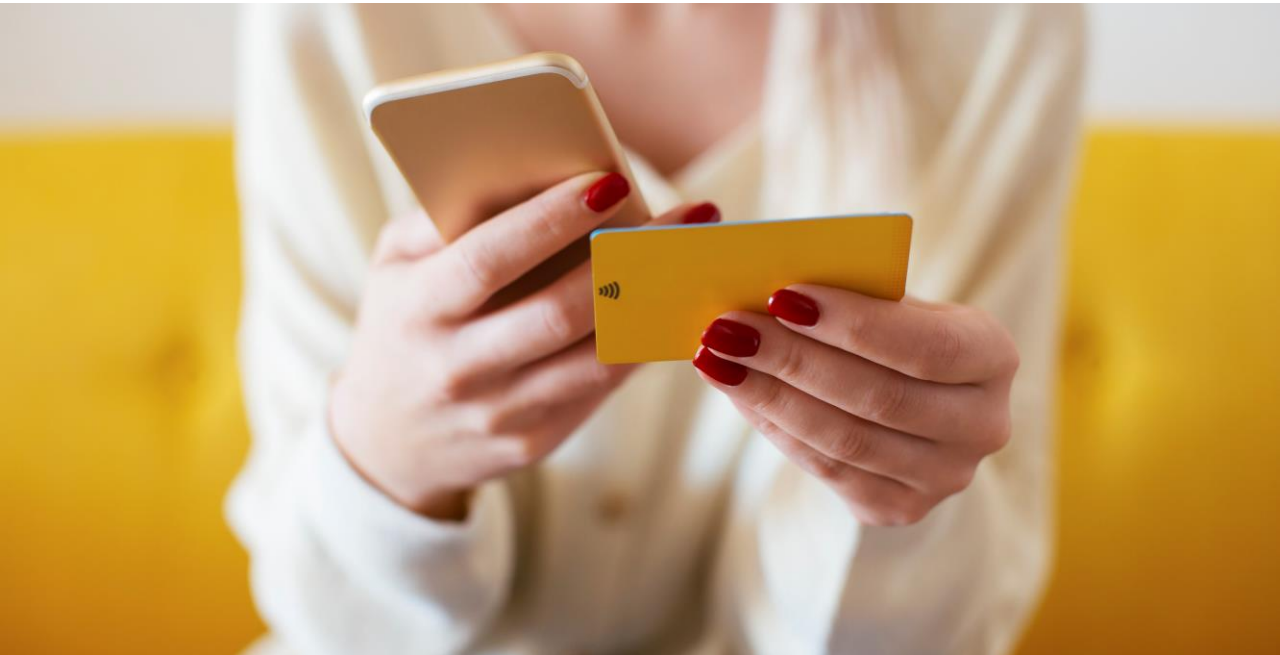
...**weaker** customer **relationships** and **lower consumer promotion**

...**costs** for customer engagement will be **higher**

...**no clear picture** of the returning **customers' spending habit**

Industry Sample Use Cases

Loyalty management is suitable for a variety of industries

Each industry can tailor the benefits to their specific consumers and needs

Retail

Sample Use Cases:

1. **Starbucks Rewards:** A loyalty program offered by Starbucks, which rewards customers for purchases made at the coffee chain stores. Starbucks also offers special promotions and events exclusively for its program members.

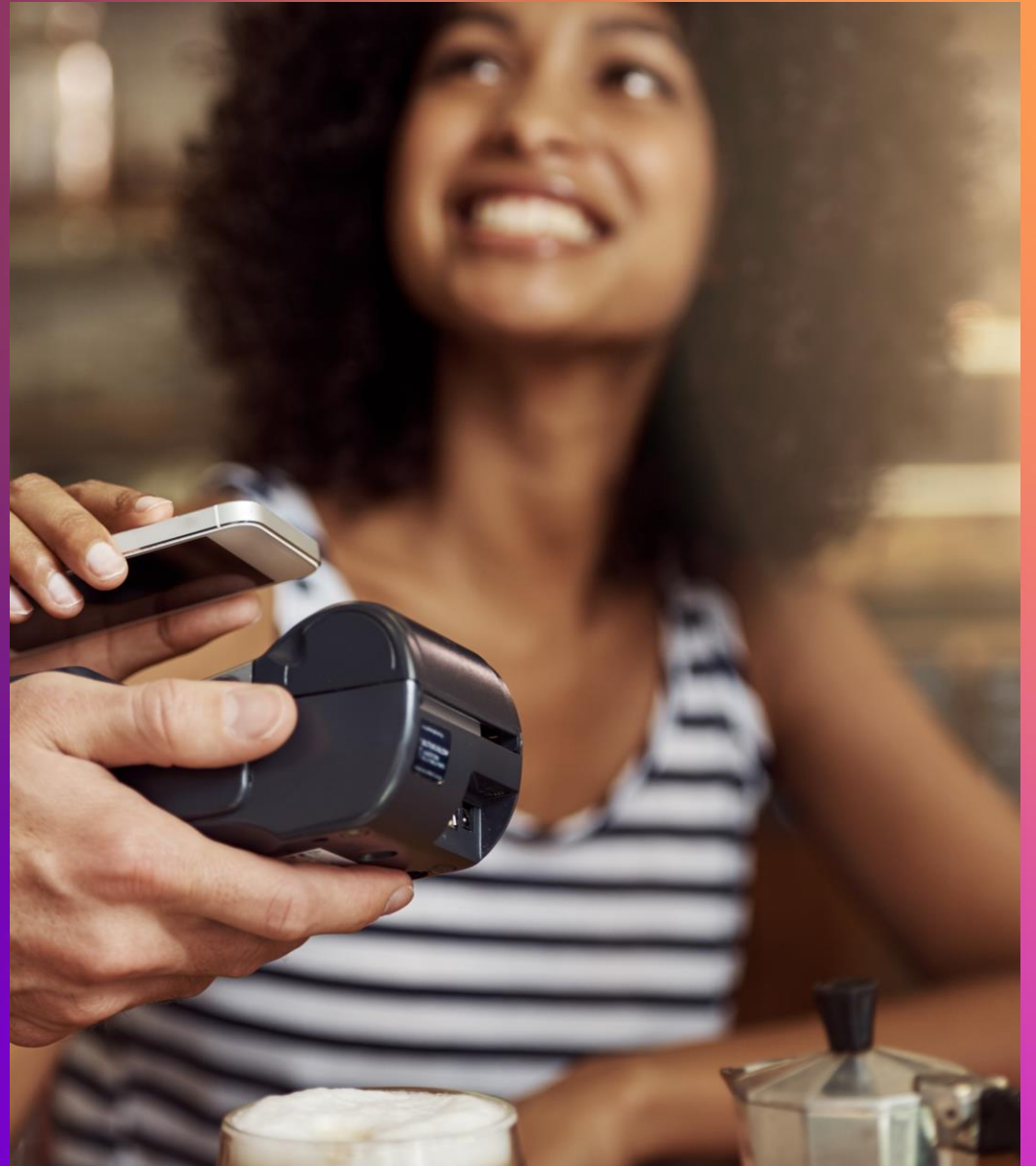2. **Amazon Prime:** A loyalty program offered by Amazon that provides members with various benefits such as free two-day shipping, access to streaming of movies, TV shows, and music, and early access to certain deals.

3. **Sephora Beauty Insider:** A loyalty program offered by the cosmetics retailer Sephora. The program has different tiers, and the more you spend, the higher the tier and the more benefits you receive.

How do customers redeem their points/rewards?

- Redeem rewards for pursue of the products
- Free shipping using Amazon Prime

Distribution of Rewards/Points Members By Age Group (Starbucks)
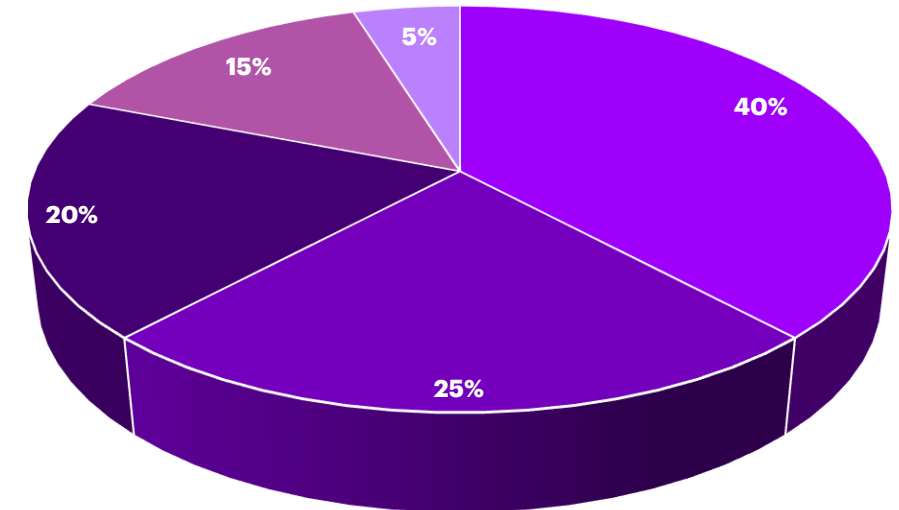
- 18-24 Years ■ 25-34 Years ■ 35-44 Years
- 45-54 Years ■ 55+ Years

Travel

Sample Use Cases:

1. **Turkish Airlines Miles&Smiles**: It offers earning miles from flights with Turkish Airlines, AnadoluJet, Star Alliance member and other program partner airlines; earning miles by using Miles&Smiles credit cards; offers services such as lounge use, etc and the privilege of discounts on partner brands.

2. **Booking.com**: It offers two major loyalty programs: "Genius" and "Genius Business." Genius program rewards for an individual travelers who book frequently on Booking.com. Members can get discounts of up to 15% on select properties. Genius Business program is designed for corporate travelers.

How do travelers redeem their points?

- Redeem miles for flights
- Use points for a car rental, hotel, or other
- Earn miles to shop
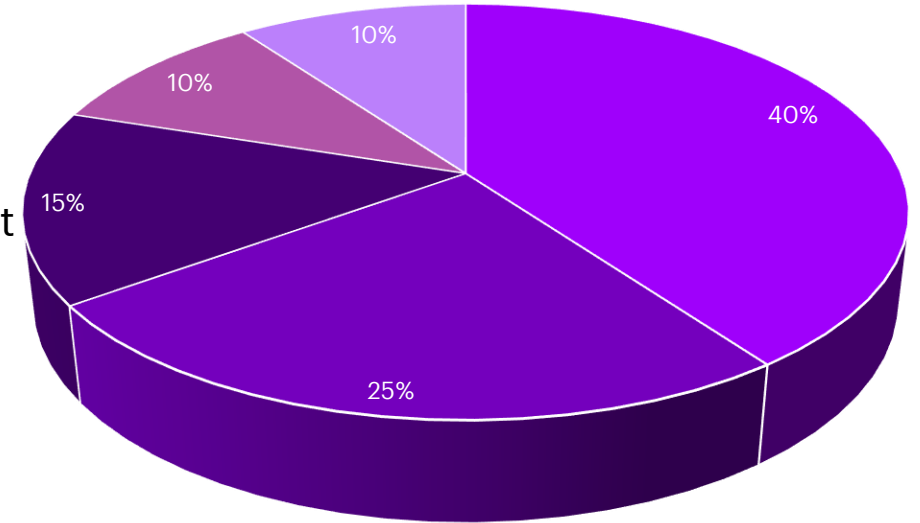
- Free hotel stays
- Airline miles or points
- Upgrades (flights/hotel rooms)
- Cashback or discounts on future bookings
- Exclusive access to travel deals or promotions

82% state they enjoy airline loyalty programs, while 81% cherish their rewards.

https://www.criteo.com/blog/travel-loyalty-trends/

Financial Services

Sample Use Cases:

1. **American Express Membership Rewards**: A loyalty program offered by American Express that rewards cardholders with points for their spending on their credit cards. American Express also offers a range of bonus points and benefits for using their cards

2. **Paytm Payments Bank**: Paytm Payments Bank is a leading provider of UPI-based payment services in India. The bank offers a loyalty program called Paytm First Points, which rewards customers with points for their transactions made through Paytm UPI.

How do customers redeem their points?

- Cashback, Merchandise, Gift Cards
- Avail the points for travel and hotels
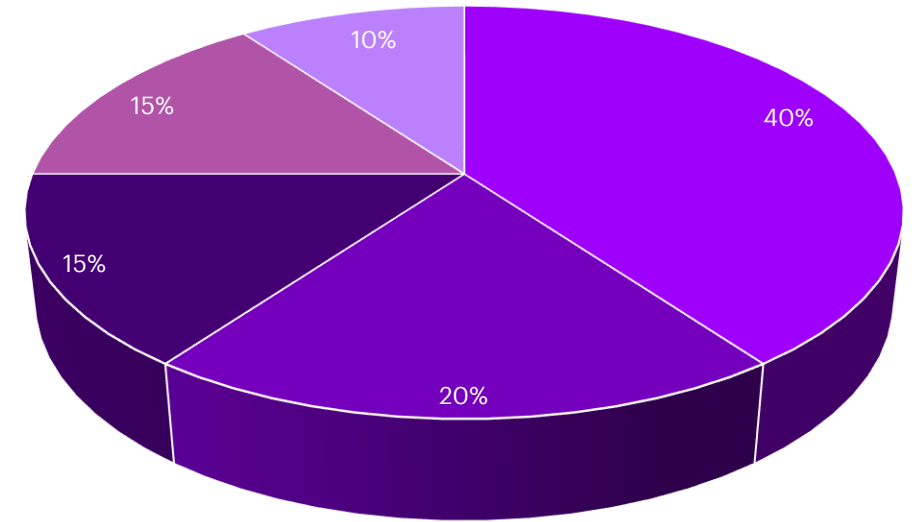
- Cashback or rebates on purchases
- Exclusive access to financial products or services
- Discounts on financial services
- Bonus points or rewards for transactions
- Personalized financial advice or consultations

B2B
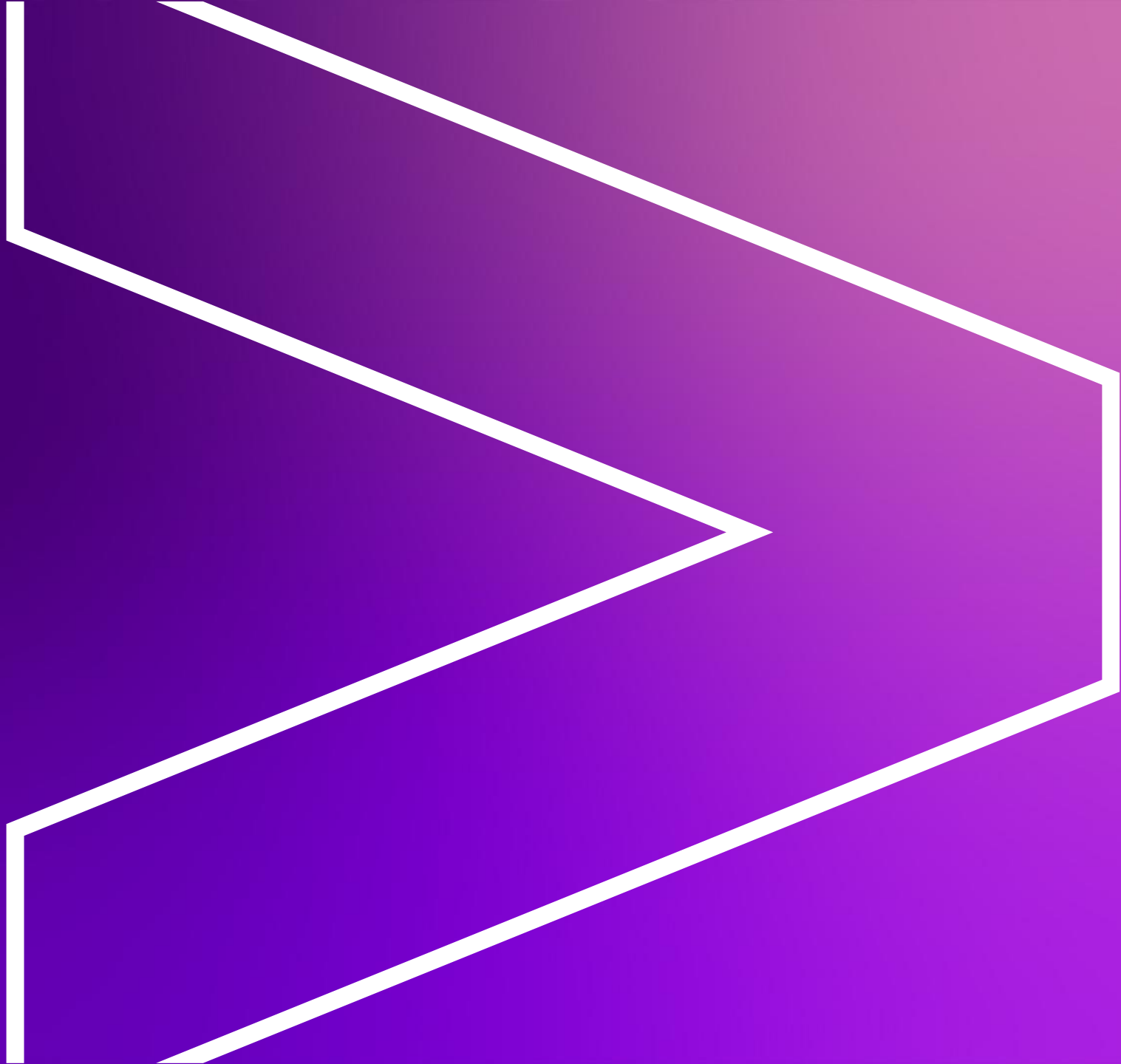
Trends Influencing the Demand for Loyalty

Facts Influencing the Need for Loyalty Programs

Revenue comes from existing customers

B2B companies earn a large share of their revenue with upselling and cross-selling from ongoing sales to existing customers.

Retain your most valuable clients

Recruiting new customers in the B2B space is a time-consuming and costly process.

Build valuable experience

80% of B2B buying decisions are based on the buyer's experience. Only 20% of buyers go on the price or product/service.

Challenging B2B relationships

Long-term client relationships are a must-have in B2B for a consistent ROI.

The need for a loyal customer base will continue to rise

https://www.entrepreneur.com/growing-a-business/heres-what-really-builds-customer-loyalty-in-the-b2b/439430
https://www.business2community.com/loyalty-marketing/b2b-loyalty-programs-a-comprehensive-guide-2021-02387631
https://peertopeermarketing.co/b2b-loyalty-program/
https://www.xstak.com/blog/b2b-loyalty-programs

B2B Loyalty Trends

Data Optimization

- Data and AI are essential to B2B Sales & Marketing
- With the help of AI companies can gain insights into their customers, tailor Sales and Marketing strategies and track ROI

Mobile-Focused Strategies & Omnichannel Engagement

- Mobile phones play a significant role in the buying process, as customers use them to search for reviews, compare prices and buy online
- B2B decision makers are using more channels than ever before to interact with suppliers: providing seamless omnichannel experience, online as well as offline, optimized for cost and performance is essential

Investments in Brand and Community

- Investing in the company's brand and community is important for B2B as it increases brand awareness, trust, competitiveness, and yields a pipeline return in the future

Customer Centered Experiences

- B2B customers are increasingly demanding a B2C buying experience. Companies should adopt a customer-focused Sales & Marketing Strategy to increase customer value, reduce churn, boost loyalty, and improve relationships

https://www.apexloyalty.com/b2b-loyalty-trends-for-2022/

Key Numbers

5-20%

increase in annual revenue with B2B loyalty programs

55%

of B2B organizations that have a loyalty program experience improved customer retention rates

13%

higher spending by B2B loyalty program participants in comparison to non-participants

10x

higher likelihood for loyal B2B customers to make a repeat purchase from a company than a new customer

Why Loyalty Programs

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Loyalty programs increase customer satisfaction and trust as companies go beyond the transactional relationship

Companies need to adapt and evolve to remain top of mind and give customers a reason to do repeat business

2% increase in customer retention has the same effect on profits as a 10% cost cut

42% of organizations are more likely to continue their business relationship with a supplier who offers a loyalty program to earn points/other rewards

Benefits for Companies

Higher Revenue

Competitive Advantage
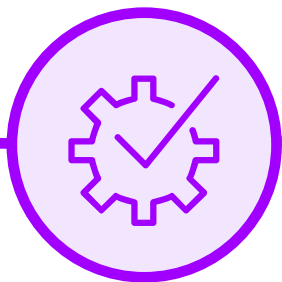
Streamlined Operations
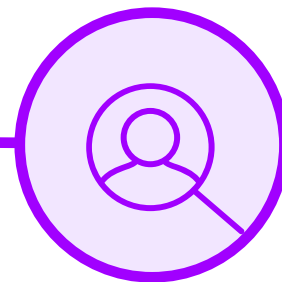
Enhanced Customer Insights
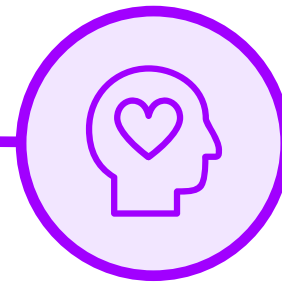
Increased Customer & Brand Awareness

Improved Customer & Partner Engagement

Benefits for B2B Customers

Rewards (Including Partners)

Exclusive Products and Services
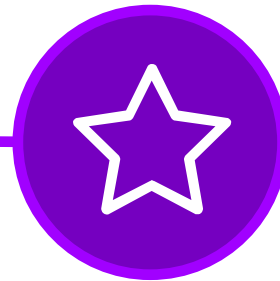
Personalized Experiences

Better Customer Service

Without Loyalty Programs...

...maintaining **long-term relationships** is more challenging

...inferior **competitive advantage**

...there are **less engaged customers** and **less brand advocates**

Industry Sample Use Cases

Loyalty management is suitable for a variety of industries

Each industry can tailor the benefits to their specific customers and needs

The diagram shows "Industries & Rewards" at the center with "Customer Loyalty" below, surrounded by segments: Events (Partner's Meet), Extended Returns, Points, Pre-Launch Sale, Software Privileges, Discounts, Training, Exclusive Products, Priority Services.

Retail

Sample Use Cases:

1. Cisco's Partner Plus Program: Offers rewards for registering deals, participating in training programs, and achieving sales goals.

2. Dell Technologies Partner Program: Offers rewards for achieving sales targets, participating in training programs, and developing new business opportunities.

How do customers utilize the rewards/Points that they've earned through the loyalty program ?

- Rewards include exclusive discounts, deal registration protection, and other incentives that help partners grow their business with Dell

- Rewards include cash rebates, marketing development funds, and other incentives that help partners grow their business with Cisco
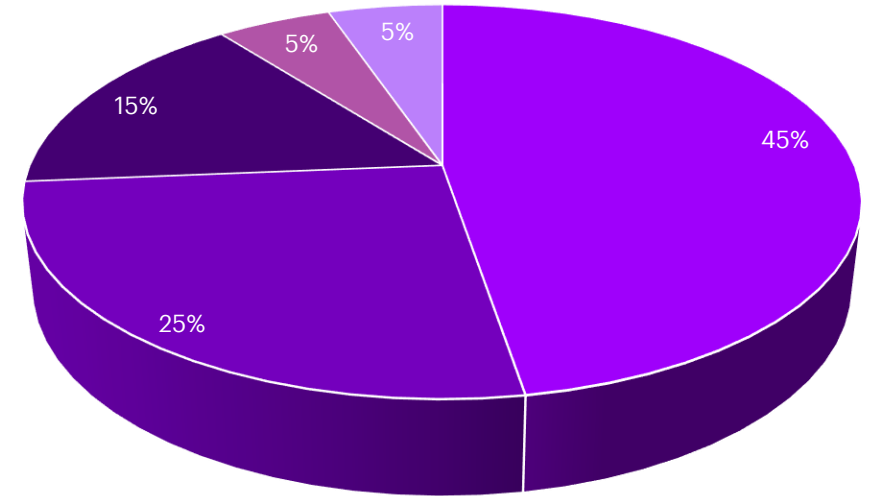
- **Discounts on future purchases**
- **Free products or services**
- **Cashback or rebates**
- **Personalized Consultations**
- **Exclusive Access to Sales/Promotions**

Travel

Sample Use Cases:

1. <u>Lufthansa Cargo Reward Program</u>: Designed for businesses that ship cargo with Lufthansa Cargo.

2. <u>Emirates Catering Loyalty Program</u>: Designed for businesses that order catering services from Emirates Flight Catering to other Airlines.

How do customers utilize the rewards/Points that they've earned through the loyalty program ?

- Exclusive benefits and rewards for cargo shippers, including bonus points for shipments, access to priority services, and discounts on cargo fees
- Exclusive benefits and rewards for catering customers, including bonus points for orders, discounts on catering fees, and access to special promotions

The Travel and Hotel Industry Loyalty Programs
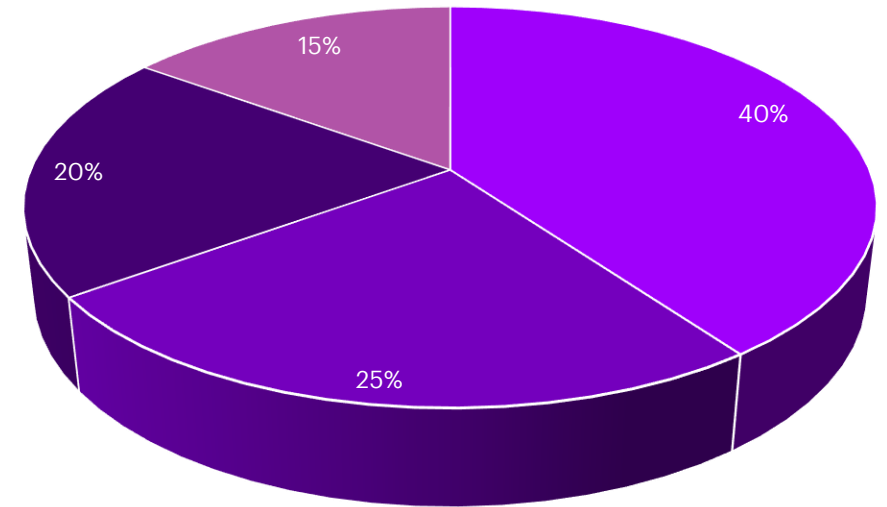
- Discounts on Future Bookings
- Free Travel/Hotel Stays
- Upgrades (flights/hotel rooms)
- Exclusive Access to Travel/Hotel Deals

Manufacturing

Sample Use Cases:

1. <u>Tetra Pak's Advantage Customer Loyalty Program</u>: Designed for businesses that use Tetra Pak packaging products

2. <u>CAT(Caterpillar Inc.) Customer Value Agreements (CVA)</u>: Cat CVAs are service contracts that provide customers with maintenance and repair services for their Caterpillar equipment

How do customers utilize the rewards/points that they've earned through the loyalty program ?

- Exclusive benefits and rewards for loyal customers, including access to technical support, training resources, and special promotions

- Exclusive benefits and rewards for customers who sign up for long-term service contracts, including discounts on parts and services, priority service, and access to exclusive promotions

The Manufacturing Industry Loyalty Programs
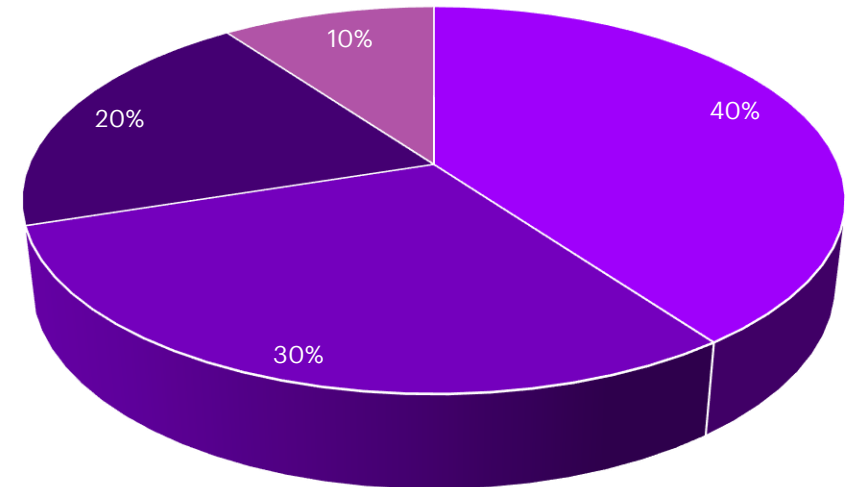
- Discounts on Future Orders
- Free Products or Services
- Priority Order Fulfillment
- Exclusive Access to New Products or Prototypes

Managing Loyalty Programs with Salesforce

Why Salesforce?
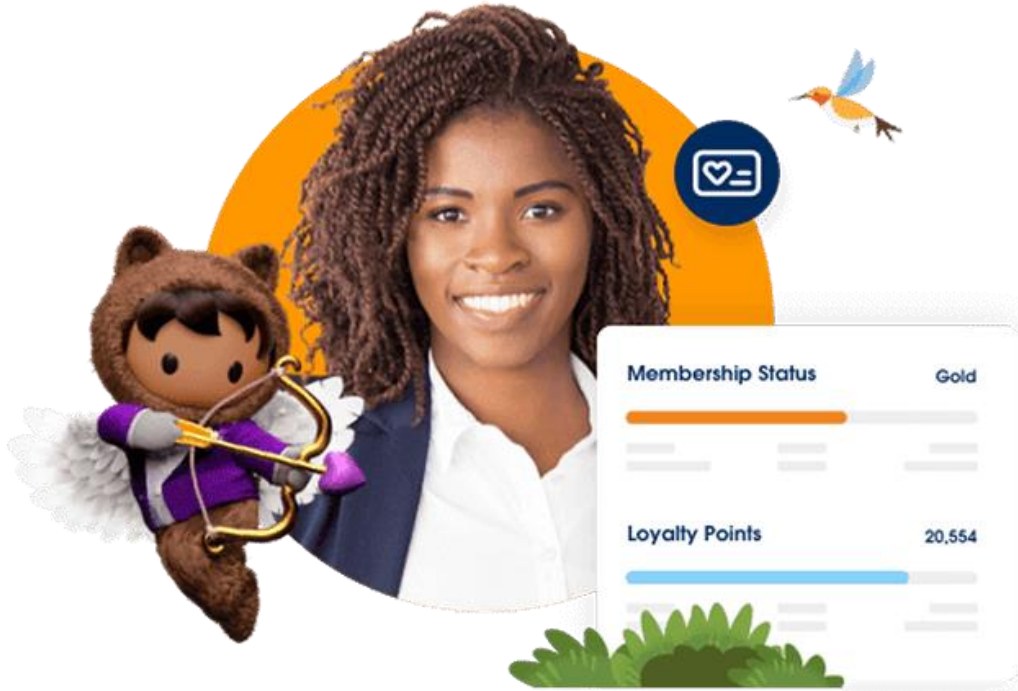
#1 intelligent CRM platform for **businesses of all sizes** and **industries**

At every step of the customer journey **a complete CRM cloud solution for a 360° customer view**

Cutting edge technology and **innovation in a scalable platform, which integrates seamlessly**

A powerful, yet secure platform, protecting customers' data

And, everything above available on **mobile for on the go** loyalty program management

Challenges with Loyalty Program Implementations

Separate systems
- It takes a lot of time to integrate different solutions and seamlessly manage high volumes of data with real-time updates

Program tracking
- Separate systems make it hard, if not impossible, to track customer lifetime value

Personalization
- Most organizations rely on tools that engage customers based on their purchases and don't consider customer experiences or preferences

Audience targeting
- Benefits, promotions, and discount vouchers are all time-tested strategies to keep the customer engaged

Timeliness
- Today, organizations must become customer advocates, providing customers with the right solutions and services at the right time

Points management
- Organizations find it difficult to debit, credit, or expire points based on the millions of customer transactions every day & time - consuming automating points management

Salesforce Helps Overcome These Challenges

Separate systems

Single centralized platform, unifying data from departments and systems. Adaptable end-to-end platform, allowing maximum flexibility in building loyalty programs.

Seamless integration with multiple channels allows businesses deliver consistent customer experience.

Personalization

With centralized customer data, including purchase history, interactions, and support, personalizing offerings is effortless, making each member feel special.

Loyalty Program Tracking

Robust analytics and reporting capabilities to help measure the effectiveness of the loyalty programs and identify areas of improvement.

Audience Segmentation and Targeting

Having customer data from each touchpoint of the customer journey, a complete 360° view of the customer and powerful integration capabilities, enables advanced customer segmentation.

Timeliness

Salesforce's AppExchange offers ready-to-use and customizable solutions, developed by experts, including out-of-the-box connectors, for swift time-to-market and value delivery to customers.

Points Management

Salesforce is a secure, scalable platform built to handle millions of users. It offers rapid scalability as needed. It offers drag-and-drop automation tools to automate loyalty management processes.

8 steps to consider for setting up a loyalty program in Salesforce

- **1. Define your Loyalty Program Objectives & Channel Strategy**
- **2. Choose a Loyalty Program Model & Define the Integrated Product Strategy**
- **3. Define your Rewards & Redemption Options**
- **4. Segment Your Customers**
- **5. Setup your Loyalty Program Structure**
- **6. Create a Loyalty Program Dashboard**
- **7. Develop a Marketing & Communication Strategy**
- **8. Audit, Test & Optimize**

Product Comparison: Salesforce Loyalty Management and Fielo

About Salesforce Loyalty Management and Fielo

Loyalty Management is **Salesforce's end-to-end cross industry** solution for designing and running loyalty programs. Loyalty Management is **versatile, flexible** and relevant for B2C and B2B companies.

It features **industry templates** and is a stand-alone product that can be **integrated into any ecosystem**.
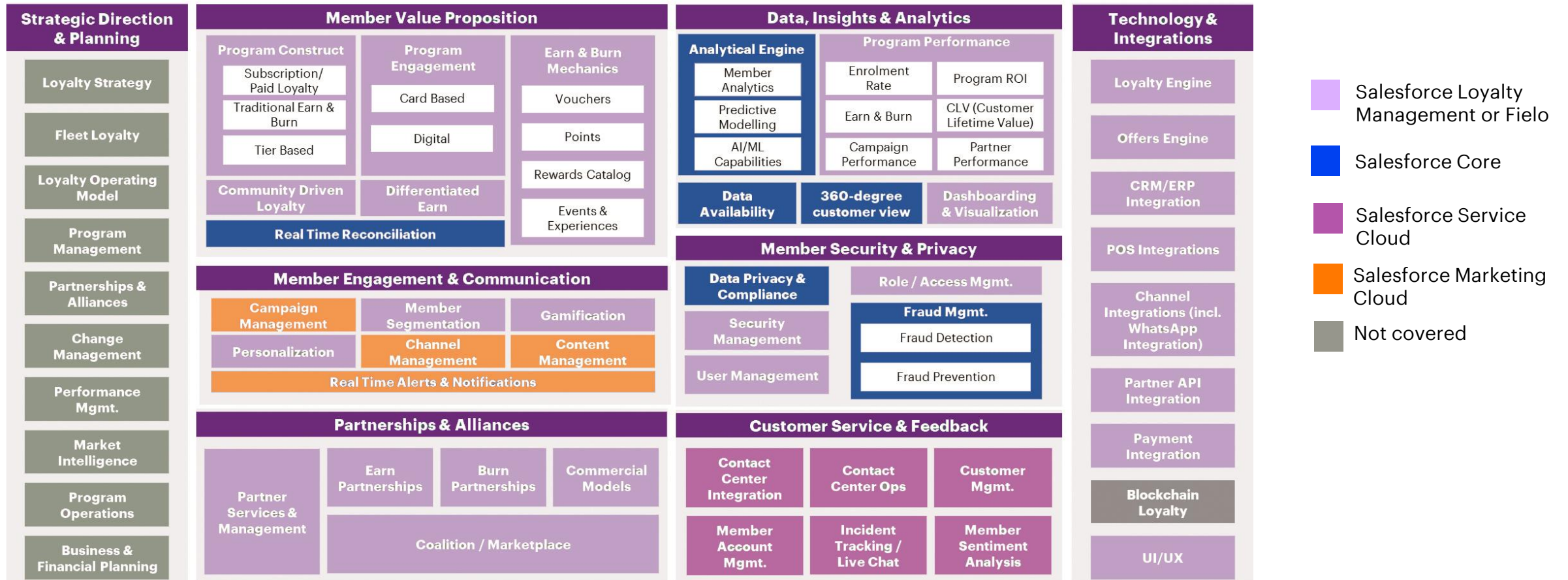
Fielo is a scalable **Salesforce native application**, enabling organizations to deploy and manage **loyalty and incentive programs** for B2B, B2C and B2E.

Fielo offers behavior templates and **4 complete solutions** on one platform:

- Channel Incentives Cloud
- Employee Incentives Cloud
- Consumer Loyalty Cloud
- Business Commerce Loyalty Cloud

Capability Map

Loyalty Program Capabilities

Strategic Direction & Planning

- Loyalty Strategy
- Fleet Loyalty
- Loyalty Operating Model
- Program Management
- Partnerships & Alliances
- Change Management
- Performance Mgmt.
- Market Intelligence
- Program Operations
- Business & Financial Planning

Member Value Proposition

Program Construct
- Subscription/Paid Loyalty
- Traditional Earn & Burn
- Tier Based

Program Engagement
- Card Based
- Digital

Earn & Burn Mechanics
- Vouchers
- Points
- Rewards Catalog
- Events & Experiences

- Community Driven Loyalty
- Differentiated Earn

Real Time Reconciliation

Member Engagement & Communication

- Campaign Management
- Member Segmentation
- Gamification
- Personalization
- Channel Management
- Content Management

Real Time Alerts & Notifications

Partnerships & Alliances

- Partner Services & Management
- Earn Partnerships
- Burn Partnerships
- Commercial Models
- Coalition / Marketplace

Data, Insights & Analytics

Analytical Engine
- Member Analytics
- Predictive Modelling
- AI/ML Capabilities

Program Performance
- Enrolment Rate
- Program ROI
- Earn & Burn
- CLV (Customer Lifetime Value)
- Campaign Performance
- Partner Performance

- Data Availability
- 360-degree customer view
- Dashboarding & Visualization

Member Security & Privacy

- Data Privacy & Compliance
- Role / Access Mgmt.
- Security Management

Fraud Mgmt.
- Fraud Detection
- Fraud Prevention

- User Management

Customer Service & Feedback

- Contact Center Integration
- Contact Center Ops
- Customer Mgmt.
- Member Account Mgmt.
- Incident Tracking / Live Chat
- Member Sentiment Analysis

Technology & Integrations

- Loyalty Engine
- Offers Engine
- CRM/ERP Integration
- POS Integrations
- Channel Integrations (incl. WhatsApp Integration)
- Partner API Integration
- Payment Integration
- Blockchain Loyalty
- UI/UX

Legend:
- Salesforce Loyalty Management or Fielo
- Salesforce Core
- Salesforce Service Cloud
- Salesforce Marketing Cloud
- Not covered

Accenture has a detailed loyalty platform vendor assessment framework, which helps to score various vendors across multiple levels of a loyalty program, please reach out to us in case you are interested in an assessment project.

Product Features Overview

Loyalty Management Platform Capabilities

Program Setup and Management/ Functional Features

Program Setup Wizard	Setting up Program Rewards
Loyalty Processes	Vouchers Management
Member Management	Rewards Management
Members Segmentation	Promotions Management

Partnerships and Alliances

- Earn Partnerships
- Burn Partnerships
- Partner Services and Management

Privacy and Security

- Consent Management
- Data Privacy

Analytics & Insights

- Reports
- Dashboards
- Real-time Monitoring

Integration

- ERP/CRM Integration
- Partner API Integration
- Payment Provider/POS Integrations
- Channel Integrations

Functional Features

About the Functionality	Salesforce Loyalty Management	Fielo
Program Set-up Configuring the program to meet the requirements of the business. Includes: setting up program rules, tiers, currencies, rewards, program members, segments, etc.	The guided program setup process for Salesforce Loyalty Management consists of: • Program Configuration • Earning Rules • Rewards • Member Tiers • Promotions • Analytics and Reporting Cloning a program is possible	A **Setup Wizard** can be used to quickly set up a program in four easy steps, featuring: • Tier and segment templates • Behavior Types like Lead and Opportunity behaviors, such as Register a Deal, Register a Lead, Covert a Lead, Win New Customers, etc. • Program cloning
Loyalty Processes Refers to the creation and management of processes related to customer recognition, rewards, redemptions and level assessments.	OOTB tools such as Flows and Data Processing Engine to define loyalty programs' rules, for example point attribution, tiers upgrade and so on.	Tools like rule's engine and segmentation engine allow for defining how program participants can earn points, rewards or badges and for personalizing the program experience. Gamification in a loyalty program can be added by building different challenges.
Member Management Refers to managing member data and activity, including referral tracking.	Tracked back to **Account** and **Customer** objects on Salesforce Core Modules. The setup is similar to Salesforce's core products creating a customer 360 degree view including Loyalty aspect. Referral tracking is configurable.	Fielo uses SF's account and contact structure as a basis for their membership model. Member data can be viewed and managed easily including redemptions, transactions, segments and consents. Referral tracking is easily configurable.
Members Segmentation Refers to the capability to create member subsets, based for example on demographic, pofile level information or behaviours for more effective loyalty program campaign, incentive or rewards targeting.	If connected with other systems such as Marketing Cloud.	Fielo offers two segment types: **dynamic** and **manual**. Dynamic segments will automatically add any member who falls in the segmentation criteria. Segmentation can be behavioral, record based, based on fields from any object in the SF org, including Fielo objects.

Functional Features

About the Functionality	Salesforce Loyalty Management	Fielo
Vouchers Management Refers to creating, assigning and management of vouchers, for example vouchers for percentage discounts or an „amount off" voucher.	"**Voucher Definitions**", as part of the **Loyalty Experiences** (rewards to loyalty program members). • Fixed Value • Discount Percentage • Product or Service	Vouchers are **created as rewards** in Fielo and are no separate object. The voucher validity can be set when creating the reward. The unique voucher codes are generated automatically when the reward is redeemed. To ensure code uniqueness at scale using pre-loaded unique codes is possible.
Promotions Management Refers to managing promotions, used to promote members engagement in a loyalty program.	"**Promotions**", as part of the **Loyalty Experiences** (rewards to loyalty program members). • Credit Points • Issue Voucher	**Promotions** are part of the core Fielo product and are used to encourage behaviours and actions to reward independently and do not have to have a defined period.
Rewards Management Refers to creating, assigning and management of rewards, which can be any product or service.	"**Benefit Types**" as part of the **Loyalty Experiences** (rewards to loyalty program members). The admin can define different categories of benefit to better organize diverse advantages.	**Rewards** are the prizes available to members of a program such as products, services, gift cards & vouchers, payouts or training courses and events. Rewards can be capped to control loyalty program spending.

Functional Features

About the Functionality	Salesforce Loyalty Management	Fielo
Partnerships Loyalty program partnerships, where customers can collect or redeem points at program partners.	Linked to external partner for loyalty members redemption	Fielo connects to a **third-party product GRS** to access a diverse array of partners and automatic customization to ensure rewards catalog is highly relevant and enticing to program members. OOTB connector exists.
Analytics Refers to the functionality to monitor and assess loyalty programs performance and effectiveness with reports and dashboards.	**Dashboards** to view KPIs, Reports to analyse trends and opportunity for improvement, predictive analytics to identify pattern in customer behaviour, segmentation to segment members and campaign analytics	Leveraging **SF Report**, Fielo Analytics offers a complete view of program statistics in dashboards divided in categories, with some *out of the box* reports such as: • Top engaged members • Churn Rate • Redemptions Cost
Industry Templates Templates are pre-built configurations, designed to help businesses quick start a loyalty program pertaining to their industry. Templates can contain typical for the industry rules and reward structures.	The following templates, which include **pre-built customizable components** are available: Retail, Hospitality, Financial services, Consumer goods, Automotive template, Media and Entertainment, Travel and transportation, Healthcare and Nonprofit	Currently no industry templates are available. Fielo works with behaviour templates and also offers Models, which are pre-configured, reusable Incentives and Programs templates in their E-learning and Proof of Purchase packages.
Privacy & Security Refers to the capability/tools of the loyalty managament product allowing the handling of customer data according to data and privacy regulations such as GDPR.	**Data encryption**, **User authentication** and **access controls**, monitoring and auditing to identify any potential security threats and Compliance with data protection regulations. In addition to these features, Salesforce Loyalty Management can also take additional steps to enhance privacy and security like limitation of customer data, password policies and provide security training for users.	Fielo offers **Consent Management** on granular level for each program, Member Opt Out and Banning, and Data Anonymization to comply with the right to be forgotten requests and Data Portability to export member data.

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Integration Capabilities

Salesforce Loyalty Management	Fielo
ERP/CRM Integration Loyalty management is built natively for Salesforce and can be integrated with any external systems as stand-alone product via integration layers, such as Mulesoft and Boomi.	**ERP/CRM Integration** Fielo is built natively for Salesforce, which allows data to flow seamlessly between Fielo and Salesforce, enabling program participants to be incentivized for any behavior captured as a Salesforce object. A B2B Commerce Connector is available ootb for customers using Salesforce's B2B Commerce solution.
Partner API Integration Partner APIs provide a flexible and powerful way to integrate Salesforce Loyalty Management with other systems. Data Flows between external systems will need to be mapped and replaced to be integrated via API.	**Partner API Integration** Fielo offers an ootb **Fielo-GRS Connector** to connect to Global Rewards Solution for access to rewards from hundreds of suppliers.
Payment Provider/POS Integrations Salesforce Loyalty Management integrates with payment to enable businesses to process loyalty program transactions securely and seamlessly via **API**. When a customer makes a purchase at a physical store using POS system it sends a notification to Salesforce Loyalty Management via an API. The loyalty program then credits the customer's account with the appropriate points or rewards.	**Payment Provider/POS Integrations** Fielo integrates with an external payment provider through **REST API**. In this case, the provider will receive the payment details, when it's due and do the payment automatically.
Channel Integrations With **Marketing Cloud**: use **Marketing Cloud Connect** to send data from Loyalty Management to Marketing Cloud: Connected with Marketing Cloud, you can send out transactional and commercial emails, as well as SMS and social media integration. With **Service Cloud**: create a case and populate the fields right on a loyalty member profile or associate a case with a loyalty program member.	**Channel Integrations** Transactional and campaign **emails only** with Fielo Messaging using Salesforce as an email provider. **OOTB connector available to SendGrid** for scaling email communication with program members.

Product Roadmap and Support

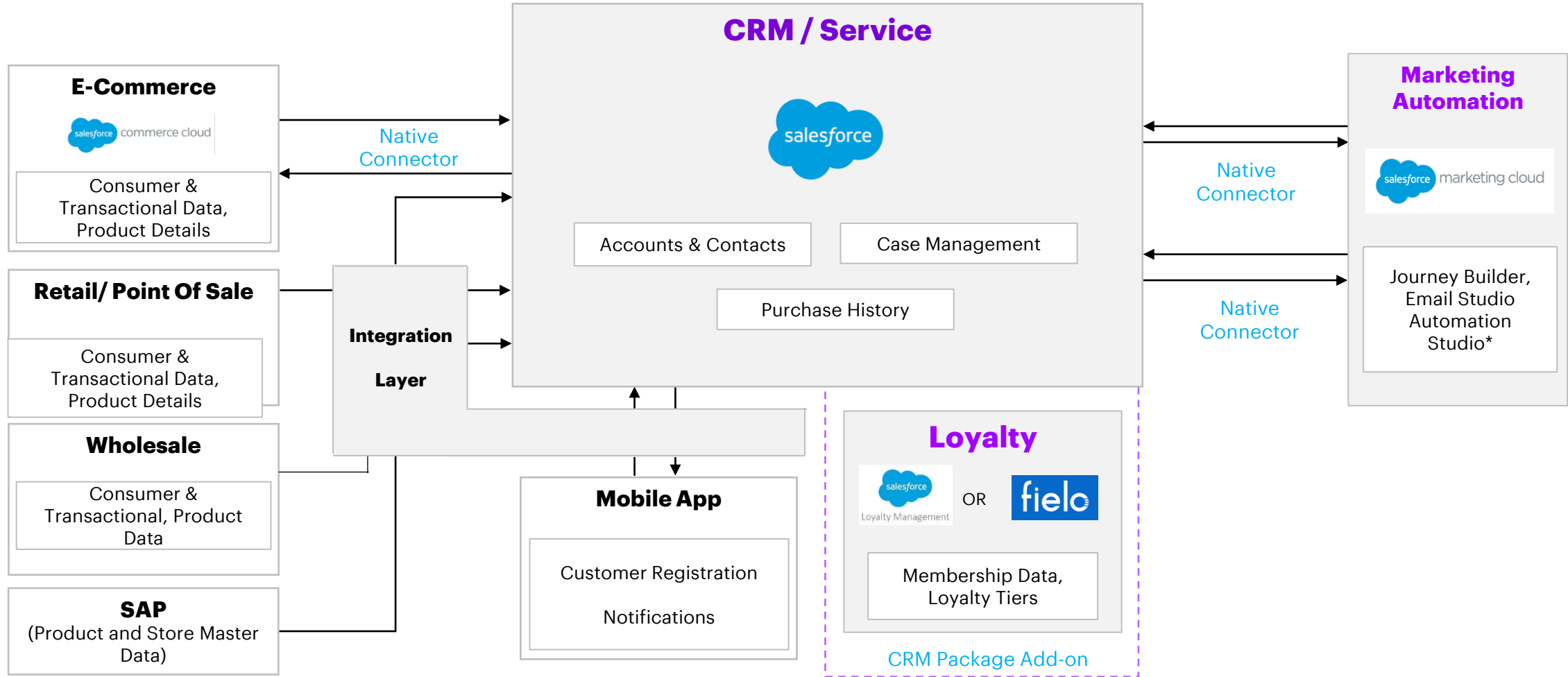| Salesforce Loyalty Management	Fielo
Roadmap • First release in January 2021 • 3 releases in one year: spring, summer and winter • Release notes to every existing and upcoming releases here	**Roadmap** • Product on the market since 2012 • New releases 2-3 times a year. Release notes, including upcoming releases • Fielo works with their clients closely on product development and to inform their roadmap
UX/UI • The UX of Salesforce Loyalty Cloud focuses on providing a seamless and intuitive experience for both companies and their customers • The UI of Salesforce Loyalty Cloud is designed to be visually appealing and engaging, with a focus on creating a consistent and coherent visual language across all elements of the platform	**UX/UI** • A UX designed for the business user to easily manage programs • No code, just clicks
Knowledge and Community • **Documentation:** Comprehensive documentation is available, providing detailed information on platform features, functionality, and best practices • **Community:** An active community of users and experts, where users can ask questions, share best practices, and learn from others. The community is an excellent resource for troubleshooting and getting help with platform issues	**Knowledge and Community** • No Knowledge-Community existing • Knowledge-library: https://docs.fielo.com/docs/ • Developer Hub and support channels
Licenses and Support , Prerequisites • Salesforce Loyalty Cloud is a subscription-based platform • Typically purchased on an annual basis and are priced based on the number of program members or participants • In terms of support, Salesforce Loyalty Cloud offers Online Support, Community, Documentation, Premium support Pricing: https://www.salesforce.com/products/loyalty-management/pricing/	**Licenses, Support, Prerequisites** • Pricing is based on program member numbers, and type of solution on a pro rata basis. ***Less expensive* than Loyalty Management – according to Fielo around 50% less.** Salesforce platform licenses is needed to access the Fielo app. • No requirement of previous configuration or storage space for the installation. • Personalized support options (depending on the contract and the needs of the customer)

Reference Architecture

Accenture Credentials

Leading Apparel Brand - Accenture implemented Salesforce Loyalty Management, fully integrated with Service Cloud, Commerce Cloud and Marketing Cloud

WHY

❑ Integrated Loyalty platform
❑ Lack of transparency and collaboration between Sales and Commerce
❑ Loyalty Management
❑ Marketing Campaigns

WHAT

❑ Improved view of loyalty life cycle of the customer associated with the Loyalty Program
❑ 360-degree view of the customer, highlighting features like Benefits, Vouchers, Current Tier, Loyalty Points, Transaction Journal
❑ Integration with Service and Marketing Cloud helped set up segmentation and campaigns
❑ Integration with Commerce Cloud for transaction points accruing and redemption
❑ Enabled customers to register for a loyalty program via multiple channels like POS, Web and Mobile App
❑ Huge volumes of data from different systems migrated to Service Cloud

salesforce
Loyalty Management
Service Cloud
Marketing Cloud
Commerce Cloud

HOW

❑ Agile delivery over 6 months and 13 Sprint Cycles
❑ Discovery to collect functional requirements followed by Design phase in close coordination with client stakeholders
❑ Development was followed by Business UAT
❑ Weekly governance meetings with Client business & IT stakeholders

WHEN

❑ Project started in Sept 2022
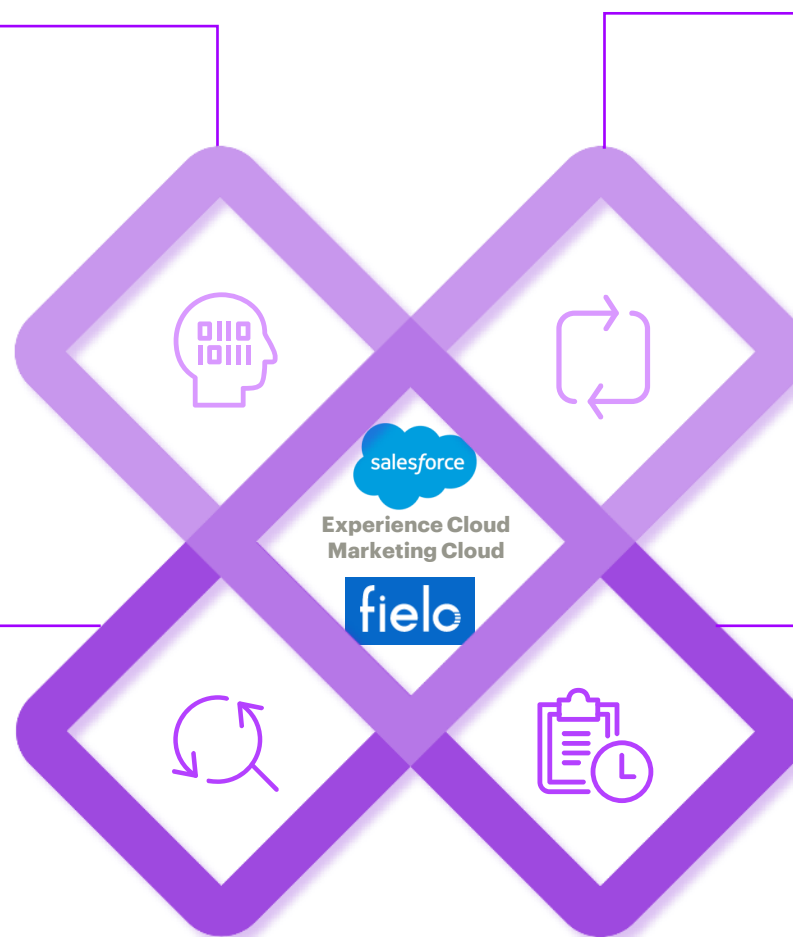❑ Phase 1 went live in April 2023
❑ Phase 2 is currently not in scope

Leading Tobacco Company - Accenture implemented FIELO Loyalty Management, fully integrated with Experience Cloud and Marketing Cloud

WHY

- Loyalty Program backend and frontend (Enrollment to a Loyalty Program, Currencies, Loyalty tiers, point validity, etc.)
- Gamification capabilities front end and backend (Leaderboard, Badge management)
- Redemption process
- LMS (Learning Management System) front end and backend
- Reporting (Dashboards)

WHAT

- Educational content structured in courses & modules for retailers to test knowledge
- Leaderboards for ranking retailers according to their overall activity completion,
- Notification via Marketing Cloud on status/results and Badge assignment under certain criteria
- Different currency setup for managing point assignment for all end users, expiration rules and redemptions process
- Sophisticated criteria for segmenting for end users to participate to loyalty activities
- Dashboard built to track the progress of each market's loyalty program

salesforce
Experience Cloud Marketing Cloud

fielo

HOW

- Agile delivery with sprint cycles of 3 weeks
- Backlog refinement weekly sessions with Business Global Team for discussing any potential new product improvement / use case
- Development was followed by Business UAT
- Weekly governance meetings with Client business & IT stakeholders

WHEN

- Project started in Oct 2020
- Phase 1 went live in April 2021 for Canada Market
- Rollout plan with Market Activation team deployed 13 markets as of May 2023

Thank you

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Your Accenture Points of Contact

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Appendix

Customer Journey Mapping

Email notification for points deduction

Enrollment Welcome Email

Auto-assign Enrollment bonus

Make a transaction

Perform more transactions

Auto-assignment of vouchers

Tier upgrade Email notification

Associate Loyalty Member Currencies

Loyalty ledger gets created

Points get credited

Redeem Loyalty Points

Customer Enrollment → **Transactions** → **Tier Upgrade** → **Rewards and Benefits** → **Redemption**

Loyalty Member Awareness

Auto-assignment to base tier

Becomes eligible for tier upgrade

Purchase partner products

Loyalty Member Registration

Contact Member Mapping

Points update Email notification

Auto-assignment of benefits

Use unique code to shop

Loyalty Member Enrollment

Qualifying/ Non-qualifyingpoints get credited

Gets upgraded to next tier

● Customer touchpoint

● Loyalty Program

Loyalty Management Architecture

Fielo Architecture