

When is it the right option to buy incentive or loyalty software?

When considering an incentive or loyalty solution many organizations will first conduct an internal assessment on the feasibility and benefits of building an in-house solution. At this point the focus shifts from a conceptual stage to the actual requirements, timing, and resources needed.

However, this is where things can stall, and organizations may need to make a tradeoff on what is most important. If everything goes smoothly, then great! But if the internal project hits a snag, consider these ten points to support a buy business case:

- 1. No Integrations Required:** Fielo is built natively on Salesforce's Force.com platform, which means data travels seamlessly between Fielo and Salesforce, enabling incentives for any activity captured as a Salesforce object.
- 2. Limited IT Involvement:** Fielo can be installed in minutes and be configured for business users within hours.
- 3. Business User Empowerment:** Fielo provides a library of the most common incentives preconfigured, which can be launched by a business user. New point & click incentives can be added to the library in minutes.
- 4. Zero Risk:** Fielo is packed with functionality and features that are actively used by hundreds of international brands.
- 5. Segmentation Included:** Use dynamic segmentation to generate clusters, each with their own personalized incentive journey and experience.
- 6. Compatible Frontend:** Prebuilt components for Salesforce Experience Cloud are fully configurable.
- 7. Dashboards:** Prebuilt dashboards automatically surface important incentive metrics and insights.
- 8. No Data Transfer:** Fielo resides inside your Salesforce org, which means sensitive data does not need to be transferred externally or encrypted.
- 9. No Hosting. No Maintenance:** Your CTO/CIO will be reassured to hear that Fielo is part of the Salesforce Cloud and Trust protocols.
- 10. Add-on Applications:** Combine Incentives with Fielo Learning (LMS), Fielo Revenue Operations, or Fielo Digital Asset Management.

Why choose Fielo?

Pedigree

Having operated for 10+ years, we consider ourselves specialists in designing, launching and running incentive and loyalty programs

Proven

We have been selected by some of the largest international brands to help them launch their consumer, channel or employee reward programs

Robust

Our software has been road tested by hundreds of customers (and millions of users)

Versatile

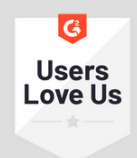
Our platform supports multi-audiences, multi-programs, multi-incentive mechanisms, multi-reward types, and multi-languages

Capabilities

We provide customers with an expansive list of product features for them to use, including the ability to launch an incentive quickly and without the need for IT resources

Cloud

Natively built and protected by Salesforce security and data controls



Incentives & Loyalty

Manage

Program Management

- Multi-program
- Registration and Agreement
- Multi-language content
- Program/Incentive cloning
- Behavior library

Data Management

- Batch and real-time processing
- 360 customer view / profiling
- Individual/Organization members with Contributors
- Libraries and Reconciliation tools
- GDPR Compliance

Transaction & Redemption

- Multiple currency type redemption
- Redemption history
- Transaction history
- Transaction adjustments

Target

Segmentation

- Live/Dynamic segmentation
- Related-list criteria
- Enabled for reporting
- Manual assignment

Tiers

- Rolling period evaluation
- Guarantee period
- Manual exceptions

Learning

- Course and Module management including cloning and segmentation
- Multi content types including SCORM compatibility
- Multiple question types (multiple choice, short answer, matching, etc.)
- Shuffle questions & answers including pool
- Question weight, pass rate, penalties, and timer
- Course dependency to unlock
- Reward with badges, points, or cash

Incentivize

Incentives

- Single-action rules engine
- Individual and team incentives
- Bundling (related data rules)
- Capability to incentivize any object
- Promotions scheduler
- External object incentivization
- Templates/models
- Multi-hop incentives
- Payout creation / Reward by source

Rebates

Create rebates by:

- Fixed Value
- Volume
- Revenue
- Growth
- Tier acceleration
- Target dynamic calculation

Gamification

- Multi-action rules engine
- Capability to incentivize any object
- Challenges & Mission scheduler
- Challenge & Mission rewarding
- Team challenges and ranks
- Missions with fixed objective
- Open-ended missions (competition)
- Prerequisites/Dependencies
- Leaderboards
- Progress tracking
- Leverage historical data
- Templates/models
- Goal-setting

RevOps

- Activity plans
- Relationship plans
- Account scoring
- Activity tracker
- Relationship tracker
- Notification alerts and reminders
- Course correct performance with Training and Incentives
- Drill-down Reporting and Analytics

Reward

Reward Types

- Currencies
- Badges/Certification
- Instant rewards
- Marketing funds

Currency

- Multiple currency types
- Currency expiration
- Redeemable currencies
- Payout currencies
- Support for decimal values
- Currency capping
- Budget management

Reward Catalog

- Internal rewards catalog
- Rewards inventory control
- Voucher codes
- Reward capping

Communicate

Messaging

- Transactional messaging
- Mass email campaigns
- Campaign stats

Measure

Analytics

- Command Center dashboards
- Goal settings for KPIs

Digital Asset Management

- Digital asset management
- Customize marketing material
- Content management system (CMS)
- Email campaigns
- Social post distribution
- Automated co-op fund tracking
- Lead generation