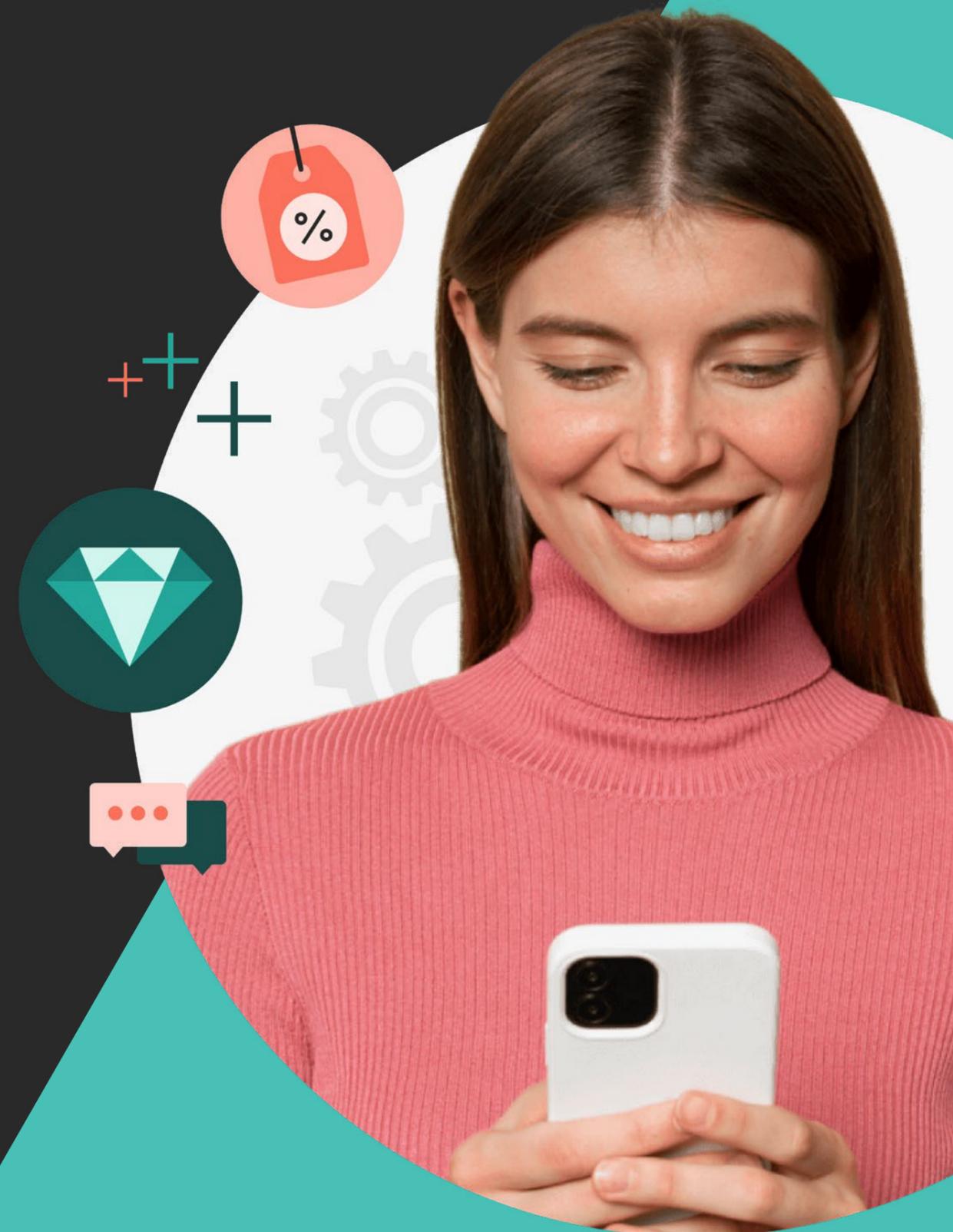




Delight Customers & Drive Loyalty

WITH CAMPAIGN MONITOR BY MARIGOLD

Get up and running with Tier Programs in
Campaign Monitor by Marigold



It's no secret that customers love personalized email experiences tailored to their unique interests. For years, brands across every industry have invested serious time, money, and effort into collecting every data point possible on a potential buyer before serving them the most relevant, engaging, and—ultimately—effective email messages possible. But what do you do with that information? How can you use it to build long-lasting relationships with your customers? One of the solutions is a loyalty program.

Before we jump in, let's discuss loyalty programs and tier programs.



What is a loyalty program?

A loyalty program rewards or incentivizes customers to keep them coming back to your shop. When a customer buys more products or interacts with your brand, they earn rewards like discounts or free products. To put it simply, a loyalty program is designed to keep customers engaged and maintain allegiance to your brand!

There are many loyalty programs out there, such as punch cards, referrals, points, and tiers. But in this guide, we will focus on a *tiered program*.



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?

Like many other loyalty programs, tier programs tend to help increase customer retention since they help foster the relationship you have with your customers. Rewards and benefits, especially exclusive ones, not only make your customers feel valued, but also incentivises 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.

Step 1: Grow your loyalty list

SETTING UP YOUR TIER PROGRAM



□ Create a list and sign-up form for your loyalty program

Before you can build out your loyalty program, you'll need to have (or create) a unique list of subscribers who have signed up for your loyalty program.

This list must have at least one of the following recommended custom fields as these fields will allow you to trigger loyalty-based campaigns in Campaign Monitor smoothly.

Custom Field Name	Data Type	Personalization Tag	Description
Current Term Points	Number	[CurrentTermPoints]	Subscriber's current amount of loyalty points for the tier term.
Current Term Spend	Number	[CurrentTermSpend]	Subscriber's current amount of dollar spend for the tier term.
Tier Level	Text	[TierLevel]	Current subscriber's tier level.

How to: You can create a new list with the following fields or update an existing list within the [Campaign Monitor UI](#) or [Lists API](#).

Create a signup page and/or pop-up to incentivize customers to sign up

Now that your list is available, encourage customers to sign up for your loyalty program by offering a special offer – such as a discount code – available immediately after signing up. Learn more about creating a signup page and/or pop-up [here](#).

Basics

Customize the overall look and feel of the signup form

Content

Styling

Heading

15% OFF

Upload a logo

Description

Sign up for our loyalty program today to receive a 15% off coupon. Receive exclusive discounts and benefits every month by participating becoming a VIP member.

Button text

Sign up today

Thank you text

Thanks for signing up to our loyalty program! Your subscription has been confirmed. You've been added to our list and will hear from us soon.

Fields

Add your existing custom fields as field options

Form fields

Name Required

Email Required

Mobile number

PREVIEW

15% OFF

Sign up for our loyalty program today to receive a 15% off coupon. Receive exclusive discounts and benefits every month by participating becoming a VIP member.

Name

Your name

Email *

Your email

I agree to be sent email notifications and marketing campaigns related to the loyalty program.

Sign up today

□ Pass loyalty data into Campaign Monitor

Once the custom fields exist in your list, you'll want to pass this data to Campaign Monitor. There are currently **3 ways** to populate loyalty data in Campaign Monitor:

1. Upload a file with subscriber data in Campaign Monitor (must include certain fields)
2. Call the Subscriber API to add/update subscriber information
3. Pass data from your CRM to Campaign Monitor using an integration

For instructions and details on each of these, view our technical guide [here](#).

□ Categorize your subscribers into tiers using Segments

The best way to think of your tiers in terms of email marketing is to essentially view them as segments. Based on the number of points your customer earns for the tier term, they can be associated with a different segment within Campaign Monitor – categorizing them into loyalty tiers.

You'll want to create segments for each of your tiers based on whether the Current Term Points are between a specified amount. Optionally, if you are passing the subscriber's Tier Level, you can use that information to build your segments.

Create a new segment



Current Term Points ▼ is between ▼ 0 and 500 + OR

For instructions on how to build segments, read [here](#).

Step 2: Plan your email marketing strategy

SETTING UP YOUR TIER PROGRAM

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□ Create campaigns and automations within Campaign Monitor

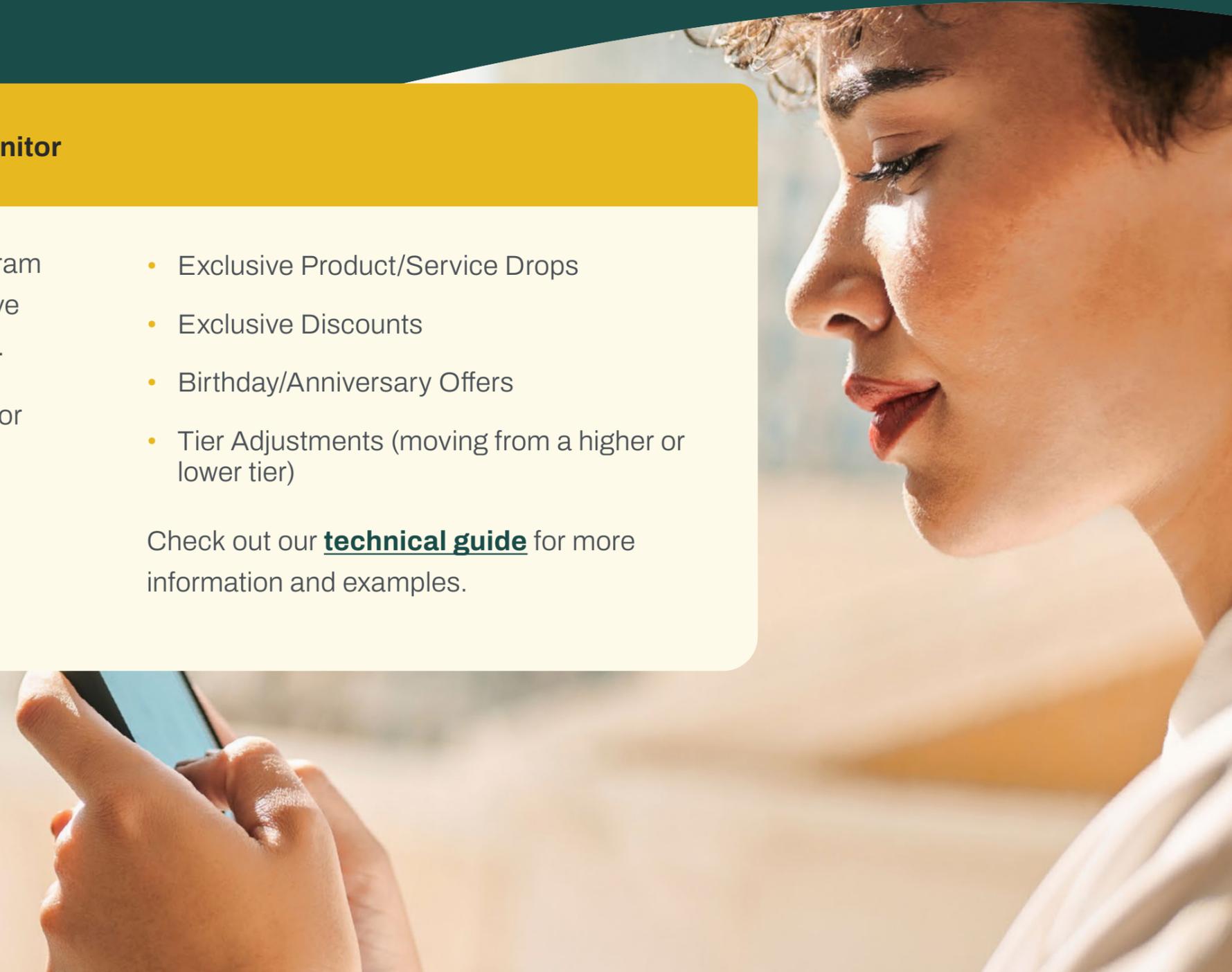
By pairing email automation and segmentation, your loyalty program can strengthen your connection with your customers and can drive customer engagement and retention efficiently and economically.

Below is a list of campaigns and journeys within Campaign Monitor that can help you introduce and market your program:

- Welcome Series (Loyalty Sign-up Confirmation)
- Loyalty Rewards Overview (Points Update)

- Exclusive Product/Service Drops
- Exclusive Discounts
- Birthday/Anniversary Offers
- Tier Adjustments (moving from a higher or lower tier)

Check out our [technical guide](#) for more information and examples.



Step 3: Create and send your first loyalty campaign

Now that your data is ingested and your journeys are set up, it's time to send your first campaign! Below are a few steps we recommend you do:

Test your loyalty program campaigns and automations

It's always good to test everything out before you launch your campaigns. Once they are activated and live, any changes you make will affect everyone who is already in the flow (or journey).

Launch your loyalty program automations

It's time to launch your program and promote it across all of your target customer segments! Optionally, you can start with an early access launch to a smaller segment of highly engaged customers. An early access launch ensures you can capture and quickly resolve any bugs this segment has found or improve any gaps in your program. For instructions on how to activate your journeys, read [here](#).

SETTING UP YOUR TIER PROGRAM



Introduce your loyalty program to your existing customers

Tell everyone about your loyalty program. Use channels to promote such as:

- Website
- Mobile App
- Social media
- In-store materials
- External channels (ads, radio, etc.)

You can also use Campaign Monitor to build an [email campaign](#) and promote it to your existing subscribers. Just be sure to personalize your messaging to the segments you'll send this message to to promote the most amount of engagement.

Step 4: Reward your customers based on their tier

SETTING UP YOUR TIER PROGRAM



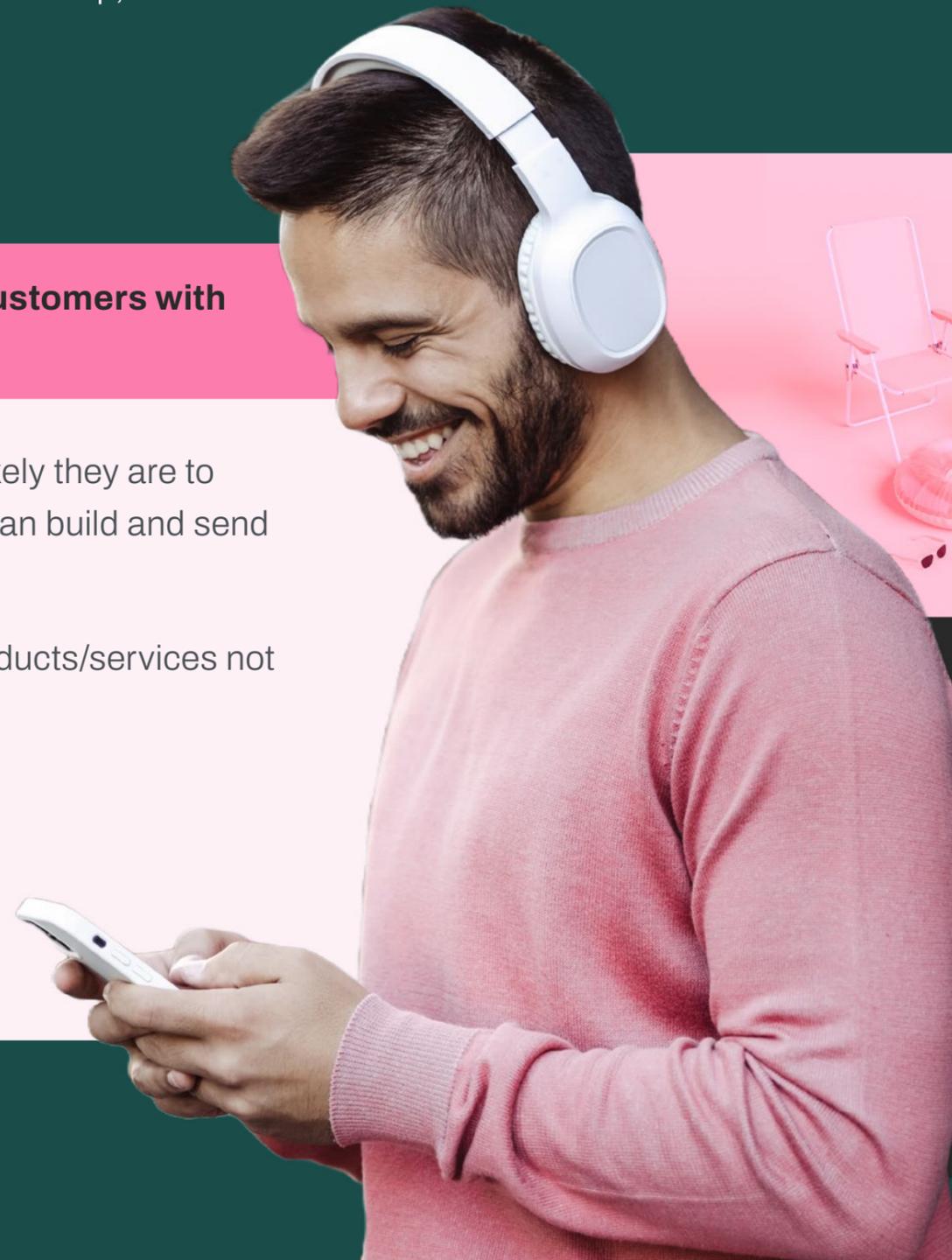
Now that your data is ingested and your journeys are set up, it's time to send your first campaign!

Below are a few steps we recommend you do:

Plan and send campaigns that reward customers with exclusive discounts

The more enticing the rewards are, the more likely they are to stay engaged. Within Campaign Monitor, you can build and send campaigns that provide incentives such as:

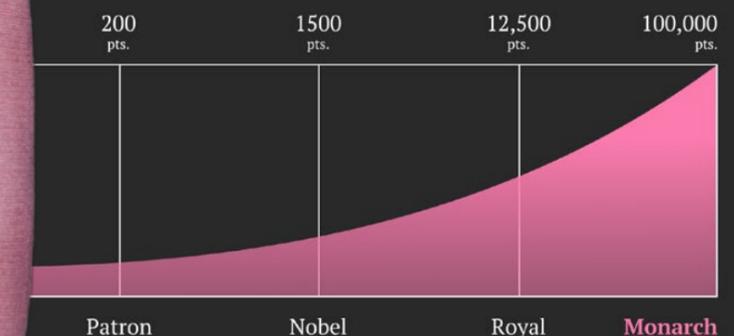
- Exclusive access to events, contests, or products/services not typically for sale
- Birthday and anniversary gifts
- Exclusive discounts
- Free shipping



Hey Alex, thanks for being a loyal customer!

**30%
off**

Congratulations! You've reached Monarch status.



Step 5: Optimize engagement

Now that your program is running, you're free to use and highlight any loyalty program information collected inside your campaigns! You can do this in three ways:

- Use custom fields to add relevant loyalty data (such as tier level or points)
- Build HTML emails and utilize dynamic tags throughout the copy
- Generate dynamic images or text with our LiveContent add-on

For instructions on how to use and highlight tier data in your campaigns, read [here](#).

Use segments to send more targeted messages based on characteristics or behaviors

As your subscribers interact with your campaigns, you'll be able to see who clicks on which loyalty-related links and create segments based on those interactions. These segments will allow you to target subscribers to incentivize them to complete your action of choice.

Alternatively, you can use engagement segments to further customize your relationships with your subscribers. Pre-built engagement segments make it easier for marketers to identify the various levels of engagement of their subscribers and deliver relevant content that reflects where they are on the customer journey.

To learn more about engagement segments, read [here](#). To read about how to create re-engagement campaigns, click [here](#).

SETTING UP YOUR TIER PROGRAM



Measure and track your loyalty campaign performance to inform the next steps in your engagement strategy

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.

Additional data around your program can be monitored within Google Analytics, your CRM integration, or analytics platform of your choice by passing data into those analytics tools.

It's also important to note the importance of Apple Mail Privacy Protection (MPP) and Machine Clicks as these may affect your campaigns. Learn more about what solutions we've put in place to combat that [here](#).

Wrap Up

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

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.



Where *relationships* take root.

Marigold's approach to relationship marketing stands alone in a world of one-size-fits-all marketing technology companies. Our solutions are designed for your specific size, industry, and maturity, giving you the technology and expertise you need to grow the relationships that grow your business, from customer acquisition to engagement to loyalty. And, with a team of strategists that provide insights into what's working, what's not, and what's changing in your industry, you're able to maximize ROI every step of the way.

